



Reference Management

EndNote

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Workshop Objectives

- What are references?
- Why referencing?
- How referencing?
- What can be referenced?
- Which referencing tools?
- EndNote software

What are references?

References are lists of the papers, books and other published and unpublished materials which the author has read in order to support the present piece of work. You may hear them called a "reference list", a "list of cited references" or a "bibliography".

- A **reference list** includes every source (book, chapter or article) that you have cited in your work.
- A **bibliography** contains all the above plus your background reading, where some sources have not been cited.

Why referencing?

- Established academic practice
- Shows where you got your information
- Acknowledges other researchers` works
- Allows other researchers to trace your sources of information quickly and easily
- Protects you against plagiarism

Two Main Referencing Styles

1. Author-Date Style
(Harvard)

2. Numeric Style
(Vancouver)

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Author-Date In Text Citations

- Cite your sources within your text by inserting the **author's surname(s)**, **year of publication**:
- **Examples:**
 - Contrary to popular perception, violent crime has been shown to be decreasing (Johnson, 2004)
 - James and Peters (2003) have argued that...

Author-Date In Text Citations

- **Referring to one or more authors in the text:**
 - One author: *Carrier (1983)* or *(Carrier, 1983)*
 - Two authors: *Carrier and Noiseux (1983)* or *(Carrier and Noiseux, 1983)*
 - Three or more: *Carrier et al. (1998)* or *(Carrier et al., 1998)*
- **Referring to multiple references by the same author**
 - If there is more than one reference in your essay by the same author then these should be listed **chronologically** in the bibliography or reference list, eg:
 - Carrier (1966)*
 - Carrier (1970)*

Journal article

AUTHOR'S SURNAME, INITIALS., Year.
Title of article. *Title of journal*, Volume
number (part), page numbers.

OZERTURK, S. and SAGGI, K., 2005. Tariff
discrimination versus MFN under
incomplete information. *Journal of
international trade & economic
development*, 14(2), 197-208.

E-journal article

AUTHOR'S SURNAME, INITIALS., Year. Title.
Journal title [online], volume (issue). Available
from: URL [Accessed date].

REED, E.J. and WOLNIAK, G.C., 2005. Diagnosis
or determination?: assessment explained
through human capital theory and the concept of
aptitudes. *Electronic journal of sociology*
[online]. Available from:
[http://www.sociology.org/content/2005/tier1/reed
_wolniak.pdf](http://www.sociology.org/content/2005/tier1/reed_wolniak.pdf) [Accessed 6/12/2005].

Book / Report

AUTHOR, Year. *Title*. Place of publication:
Publisher, (Report number).

DEPARTMENT FOR HEALTH. SOCIAL
SERVICES INSPECTORATE, 1994.

Services to disabled children and their families: report of the national inspection of services to disabled children and their families. London: HMSO.

Citing a paper or chapter in a book

1. Author(s) of the paper/chapter, surname(s) and initials
2. Year of publication
3. Title of the paper or chapter
4. Title of the book, prefaced with the word "In":
5. Editor(s) of the book
6. Volume number, part number, where applicable
7. Place of publication
8. Name of publisher

Author-Date Reference List

- Citations in the text refer to a full reference in the reference list
- All references are listed in author/date order:
- **Example:**
 - HOLLAND, M., 2002. *Guide to citing Internet sources* [online]. Poole: Bournemouth University. Available from: http://www.bournemouth.ac.uk/library/using/guide_to_citing_internet_sourc.html [Accessed 4 November 2002].
 - OXFORD ENGLISH DICTIONARY, 1989. 2nd ed. Oxford: Clarendon Press.
 - UNESCO, 1993. *General information programme and UNISIST*. Paris: UNESCO, (PGI-93/WS/22).
 - WISEMAN, S., ed., 1967. *Intelligence and ability*. Harmondsworth: Penguin.

Numeric In Text Citations

Each citation in the text is given a **number** in brackets:

Example:

- Barrett (1) and Orwoll (2) take the view that... but other authorities (3) argue that...

References are listed in number order and cited by that **same number** each time they are referred to in the text.

Numeric Reference List

1. Barrett E. The economic and human costs of osteoporotic fracture. Am J Med 1995;98:Suppl 2A:3S-8S.
2. Orwoll ES. Osteoporosis in men. Endocr Rev 1995;16:87-116.
3. Cooper C, Campion G, Melton LJ III. Hip fractures in the elderly: a world-wide projection. Osteoporos Int 1992;2:285-9.
4. O'Neill TW, Felsenberg D, Varlow J, Cooper C, Kanis JA, Silman AJ. The prevalence of vertebral deformity in European men and women: the European Vertebral Osteoporosis Study. J Bone Miner Res 1996;11:1010-18.

International Committee of Medical Journal Editors offers guidance to authors in its publication **Recommendations for the Conduct, Reporting, Editing and Publication of Scholarly Work in Medical Journals** (ICMJE Recommendations), which was formerly the “Uniform Requirements for Manuscripts Submitted to Biomedical Journals”. The recommended style for references is based on the National Information Standards Organization (NISO) called **Vancouver Style**.

Reference Management Tools

These softwares enable you to:

- Download and store references
- Include abstracts, keywords and notes with the references & also fulltexts.
- Produce lists of references for yourself or others
- Automatically insert citations of references while typing (Cite While You Write)
- Create a bibliography while typing (Cite While You Write)

EndNote®

EndNote® Web

Reference
Manager.



RefWorks

ProCite

WriteNote™

RefViz

Reference
Web Poster¹⁷

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Free, open source RM Software

- Most of the open source alternatives listed below are citation generators, which means they don't store the citations for you, but they do automatically format them in a particular citation style after you've entered all the relevant information (author, title, etc.).

Free, open source RM Software

- [KnightCite Citation Creation Tool](#) - this site generates citations in APA, MLA, and Chicago citation styles
- [EasyBib](#) - this site generates citations in MLA and APA formats
- [NoodleBib](#) (requires free registration) - this site generates citations for APA and MLA citation styles

Free, open source RM Software

- [Tech4Learning's Citation Maker](#) (requires free registration) - choose "Tools," then "Citation Maker" to generate citations for MLA and APA
- [Scribe](#) – this markup language is an ancestor of HTML and LaTeX (a citation system used by mathematicians, engineers, and scientists)

Free, open source RM Software

- [LaTeX](#) - this document preparation system is for technical and scientific work
- [BibTeX](#) - an off-shoot of LaTeX, this markup language is supported by Google Scholar
- [Zotero](#) - as an extension of Firefox, this program allows you to import citations from web pages into a personal filing system (Firefox 2.0 is required)

The two most popular packages from ISI ResearchSoft, thomson reuters are:

- EndNote
- Reference Manager

Which introduce a high level of flexibility and functionality to the bibliographic management process.

- EndNote is the industry standard software tool for publishing and managing bibliographies, citations and references on the Windows and Macintosh desktop.
- As the most sophisticated referencing product, EndNote offers extensive possibilities for the advanced user to customize the software to individual needs.

With EndNote software, you can:

- ✓ create a personalized database of references for your thesis or article in the citation style you require.
- ✓ enter references by yourself or import them from a database

- ✓ Create and reformat bibliographies in Microsoft® Word.
- ✓ Watch references appear as you write with patented Cite While You Write® technology.
- ✓ Build bibliographies in over 5,000 styles.

- ✓ Search hundreds of online resources for references for references and PDFs including Web of Science, EBSCOhost, Ovid, ProQuest, PubMed, and many more.
- ✓ Find full text for your references in one click.
- ✓ Expedite your manuscript submissions to scholarly journals.



- easy to use - Windows type interface
- convenient - automatic downloading
- flexible - many reference types and output styles
- accurate - you can keep track of publications used in your research



- requires time to learn
- some output styles may not be available or suitable
- not all online resources allow automatic downloading

General Types of Resources

1. Print Format →

Manual Data Entry

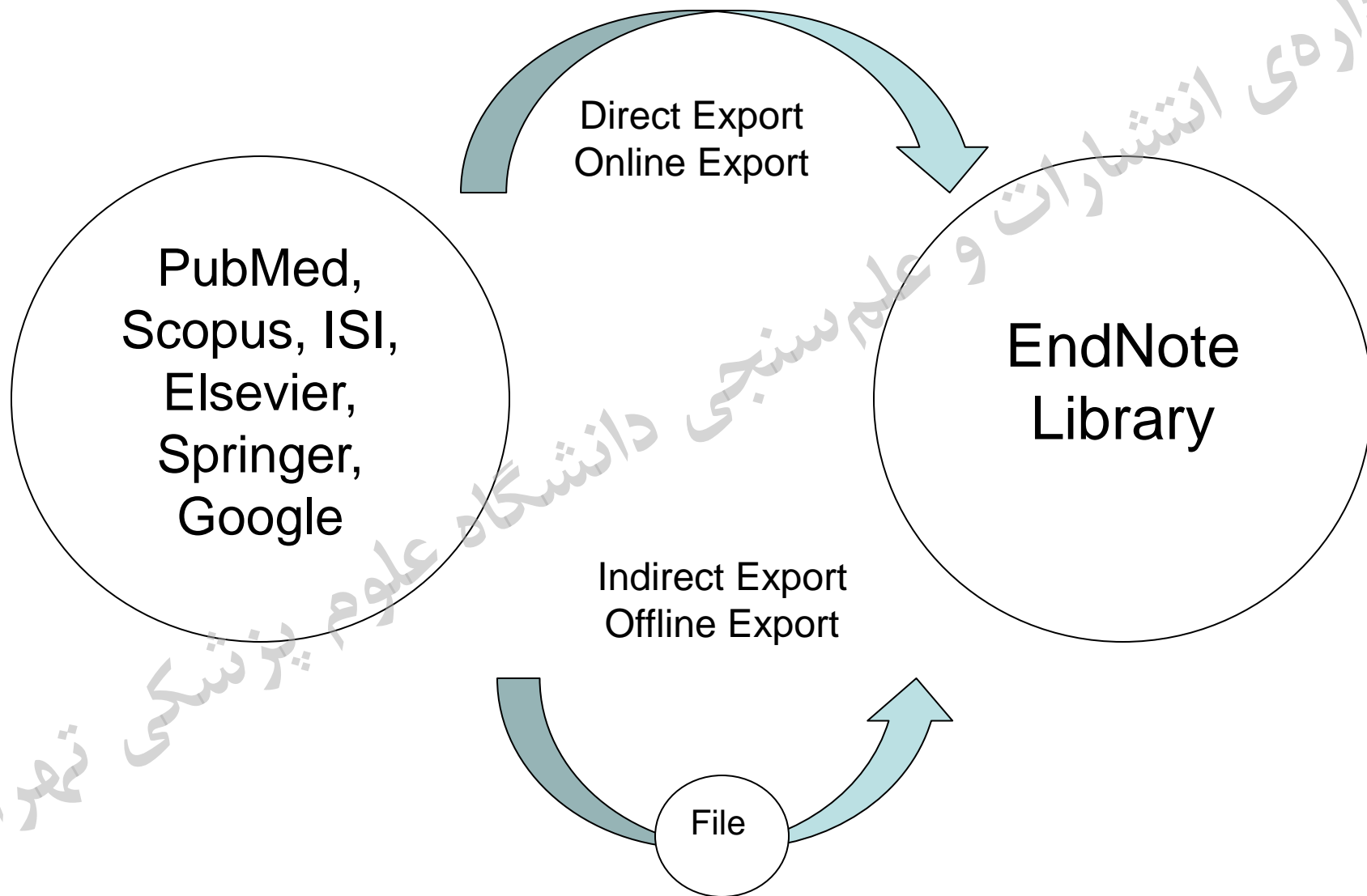
2. Electronic Format →

Direct Export

Indirect Export

Online Search

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Search and save
References (eg. PubMed, Web of Science)

Import

EndNote

Export

Microsoft Word
"Cite While You Write"

Vancouver style

Other citation styles

1. Create a EndNote database
2. Search Web of Science and mark the references for downloading
3. Select *Add to Marked List* and then *Marked List*
4. Select the fields to include: the abstract is recommended
5. Select *Export to Reference Software*
6. Select *EndNote* and then *OK*
7. Choose the EndNote database and then *Open*

Direct Export Resources

Collection	Website	Data Type	Format
Elsevier (ScienceDirect)	http://www.sciencedirect.com/	Journal Articles	Select <i>Export Citation</i>
OVID	http://gateway.ovid.com/	All Databases	Select <i>Direct Export</i> & then save
SCOPUS	http://www.scopus.com	Database	Select <i>Output</i> & Then <i>Export</i>
Wiley InterScience	http://www3.interscience.wiley.com	Journal Articles	<i>Download Selected Citations</i>
Web of Science	http://isi02.isiknowledge.com/portal.cgi?DestApp=WOS&Func=Frame	Database	Select <i>Export to Reference Software</i>
Embase	http://www.embase.com	Database	Select <i>Export</i>

Direct Export Resources

Collection	Website	Data Type	Format
Oxford Press Journals	http://www.oupjournals.org/	Journal Articles	Select <i>download to citation manager</i>
BioMedCentral	http://www.biomedcentral.com/	Journal Articles	Select <i>download references</i>
Taylor & Francis Journals	http://www.informaworld.com	Journal Articles	Select <i>download citation</i>
BMJ.com	http://bmj.bmjournals.com/	BMJ Journal Articles	Select <i>download to citation manager</i>
EBSCO	http://search.epnet.com/login.asp?site=ehost	All Databases	Select <i>Direct Export</i>
ERIC	www.eric.ed.gov	Database	<i>Add to clipboard button and then Export</i>

Direct Export Resources

Collection	Website	Data Type	Format
HighWire Press (Stanford University Library)	http://highwire.stanford.edu/	HighWire-journals, Medline	Select <i>download to citation manager</i>
JAMA and Archives	http://pubs.ama-assn.org/	Journal Articles	Select <i>download to citation manager</i>
Karger Publishing	http://www.karger.com/	Journal Articles	Select <i>Download Citation</i>
PROQUEST	http://www.proquest.com/	All Databases	Select <i>Export</i>
Science Magazine	http://www.sciencemag.org/	Journal Articles	Select <i>download citation</i>
Telemedicine Information Exchange	http://tie.telemed.org/biblio/	Telemedicine Database	Select <i>Export</i>
Thieme	http://www.thieme-connect.de	Journal Articles	<i>Export to Reference Software</i>

Inserting a citation

1. Open the EndNote database
2. Open the Microsoft Word document and position the cursor at the location for the citation
3. Select *View - Toolbars - EndNote*
4. Select *Insert Citation* on the toolbar
5. Enter identifying text in the 'Search for:' box and select *Perform Search*
6. Highlight the citation and then select *Insert*

Comparing Bibliographic Software

Feature	EndNote	Reference Manager	ProCite	Endnote Web
Version	X4	12	5	2
Organize references	Yes	Yes	Yes	Yes
Store and cite images and objects	Yes	No	No	No
Link to PDF files on the Web or desktop	Yes	Yes	Yes	No
Format bibliographies	Yes	Yes	Yes	Yes
Online database searching	Yes	Yes	Yes	Yes
Import filters for online databases	3600+ predefined; create your own	430+ predefined; create your own	580+ predefined; create your own	540+ predefined

Comparing Bibliographic Software

Feature	EndNote	Reference Manager	ProCite	Endnote Web
Z39.50 searching	Yes	Yes	Yes	Yes
Operating System	Mac OS X & Win	Win	Win	Win, Mac & Linux
Access to references	Desktop & Network	Desktop, Network & Web browser (via Web publisher)	Desktop & Network	Web browser
Software installation required	Yes	Yes	Yes	Optional toolbars - IE, Mozilla and Word
Multi-user access (network or Web)	No	Yes	No	Yes

Comparing Bibliographic Software

Feature	EndNote	Reference Manager	ProCite	Endnote Web
Multi-user access (network or Web)	No	Yes	No	Yes
# of output styles	3,600+ predefined; create your own	950+ predefined; create your own	650+ predefined; create your own	2000+ predefined
Database size	Unlimited	Unlimited	Unlimited	Unlimited
Max # of References	Unlimited	Unlimited	Unlimited	10,000
Max # of fields	52	37	45	50
Max # of Reference Types	41	35	39 + create your own	39
Create table and figure lists	Yes	No	No	No

Comparing Bibliographic Software

Feature	EndNote	Reference Manager	ProCite	Endnote Web
Subject Bibliography	Yes	Yes	Yes	No
Spell Check	Yes	Yes	No	No
Create a list of "favorite" styles	Yes	No	No	Yes
Reference grouping	Yes	Use keywords or multiple databases	Yes	Use folders
Advanced searching capabilities	No	No	Yes	No
Search across multiple databases	Cite While You Write	Databases & Cite While You Write	Cite While You Write	Cite While You Write

Comparing Bibliographic Software

Feature	EndNote	Reference Manager	ProCite	Endnote Web
Integrated in MS Word	Cite While You Write	Cite While You Write	Cite While You Write	Cite While You Write (optional installation)
Construct document with MS Word templates	Yes	No	No	No
Access OpenURL links	Yes	Yes	No	No
Unicode compliant	Yes	No	No	Yes

EndNote Web vs EndNote

	EndNote Web	EndNote
Save references	+	+
Organize & edit references	+	+
Storage capacity (number of references)	10,000	unlimited
Import from many databases and OPACs	+	+
Cite & format papers with bibliographies	+	+
Create & save advanced searches	-	+
Customize views & displays	-	+
Edit reference import filters & output styles	-	+
Use term lists for auto-entry	-	+
Cite tables, figures, & equations	-	+
Work Offline (anytime/anywhere)	-	+
Local Personal Files and Documents	-	+
High Performance Desktop Environment	-	+

EndNote Web & EndNote Users Opinion

Matching user needs with EndNote solutions

	EndNote	EndNote Web
Scholars	◆◆◆	◆
Researchers	◆◆◆	◆
Graduate Students	◆◆◆	◆◆
Teaching Faculty	◆◆	◆◆
Librarians	◆◆	◆◆
Undergraduates	◆	◆◆◆

1. **Install EndNote** on your PC/Laptop
2. **Create** an EndNote Library
3. **Collect** References and **Import** into EndNote
4. **Insert (Cite)** the References in Microsoft Word
5. **Change Reference (Citation) Style**

Step 1: Install EndNote on PC/Laptop

- a) In your PC, go to **Start -- > All Programs → EndNote**
- b) A window opens, entitled **EndNote X7**.

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Step 2 : Create an EndNote Library

- a) Open EndNote.
- b) Click on **File** → **New...** to create a new EndNote Library.
- c) Enter a filename.
- d) Click **Save**.

Step 3 : Collect References/Citations

- a) Method 1: Search in databases and export citations
- b) Method 2: Search databases directly in EndNote
- c) Method 3: Manually enter a Reference

Step 4: Insert References in Word

(Cite While You Write)

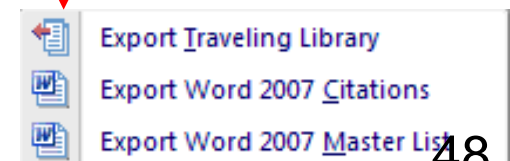
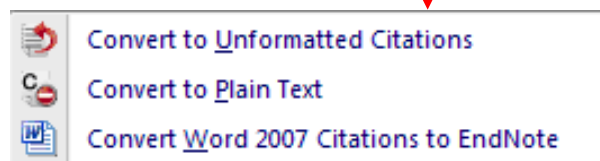
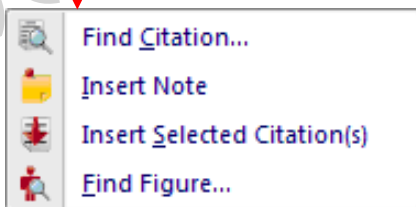
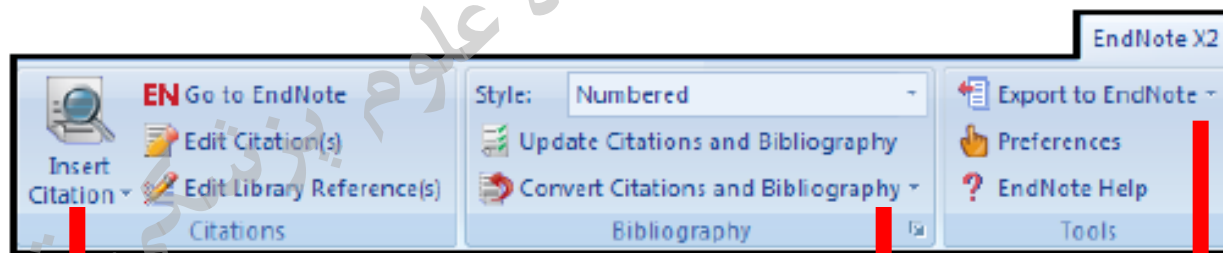
- a) In an EndNote library, highlight a reference.
- b) In Microsoft Word, place cursor at insertion point.
- c) Look for the EndNote toolbar:
 - i. For Word **2003**, click on 4th button **Insert Selected Citation(s)**
 - ii. For Word 2007, click on the button **Insert Citation**. Click **Insert Selected Citation(s)**.
- d) The reference is inserted.

CWYW Toolbar in Microsoft Word

- Microsoft Word 2003



- Microsoft Word 2007



Step 5: Change Reference Style

- a) In Microsoft Word, look for the EndNote toolbar:
 - i. For Word 2003 & below, click on the 3rd button **Format Bibliography**.
 - ii. For Word 2007, go to **Style: → Select another style**
- b) Select the desired journal style. (e.g. JAMA)
- c) The references are now re-formatted.

Remove Field Codes

- This command will create a second copy of the document with all EndNote field coding removed (you can generally recognize field codes such as formatted EndNote citations by their turning grey when you select them in Word).
- It is used when sending documents to a publisher because the field coding used for EndNote citations can sometimes cause problems for publishers' page layout programs.

✓ Deleting a citation

Highlight the citation and then select Edit Citation(s)

Highlight the citation to be removed

Select Remove and then OK

✓ Removing Duplicates

In an EndNote Library, click **References** on the menu bar → **Find Duplicates**

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- ✓ Organizing References into Groups (or folders)

Highlight a reference in EndNote Library

Right – Click → **Add References To** →

Create Custom Group

Type a group name. Enter.