

Downloading EndNote

To download EndNote, go to:
<http://www.columbia.edu/acis/software/endnote/>

Contact Information

Jerry Breeze
Government Information Librarian
breeze@columbia.edu

Fadi Dagher
Social Sciences Librarian
fd2102@columbia.edu

Alysse Jordan
Social Work Librarian
aj204@columbia.edu

EndNote Technical Support

408-987-5609 (M-F, 8am-5pm)

Important Links

EndNote company website
<http://www.endnote.com/>

Columbia Libraries EndNote webpage
<http://www.columbia.edu/cu/lweb/help/howto/endnote/>

Other Resources

EndNote Guided Tour
<http://www.endnote.com/support/helpdocs/GettingStartedGuide9.pdf>

EndNote Tip Sheets
<http://www.endnote.com/support/entips.asp>

EndNote Tool Menu

Browse to Microsoft Word's EndNote menu by selecting Tools -> EndNote 9. Here you can find citations, insert multiple citations, and format citations.

Tip: As citations are inserted into a Word document, EndNote creates a reference list at the end of the document. You can create a heading for this list such as "Bibliography" or "Works Cited."

EndNote Essentials

For the Social Sciences

What is EndNote?

EndNote is a very customizable application that allows the user to create a database of library citations that can be displayed in a variety of bibliographic styles and formats. EndNote includes more than 1,300 bibliographic styles (e.g., APA, Chicago, MLA) in which to display records. EndNote can hold up to 30,000 records, and each record can hold up to 12 pages of data.

Using EndNote

Creating an EndNote Library

- Install EndNote on your personal computer.
- Start the EndNote program -> Create a new EndNote library.

Creating a Manual Record in an EndNote Library

- Select the Reference Menu -> New Reference.
- Choose the Reference Type from the drop down menu.
- Enter data.

Adding Records via Import Filters

- Some databases will use filters. If you want to add records from a database such as PsycINFO, this is the best procedure.
- To add records, search and select appropriate records from your selected database.
- Click "Export" and give the correct filter name when prompted
- Further details and instructions for specific databases are located on the reverse of this handout.

Using EndNote to Create Bibliographies

- For *brief bibliographies*, use the copy formatted command (right click after selecting records) for up to 150 records using the selected citation style. Paste into a Word document.
- For *large bibliographies* in alphabetical order, use the export command to export all records currently displayed in the window. Save and open in Word.
- For *subject bibliographies*, select Tools -> Subject Bibliography. Follow the prompts to identify the fields to be included, and those for display. You can edit the display format via the layout screen.

Inserting Citations with EndNote

1. Open Microsoft Word.
2. Open EndNote.
3. To insert a footnote, select Insert -> Reference -> Footnote.
4. Select Tools -> EndNote 9 -> Find Citations.
5. Search for a word or words in the citation; double-click.
6. Choose the desired bibliographic style (e.g., APA 5th, Chicago 15th).
7. For in-text notes, select desired bibliographic style in EndNote, place cursor where the citation should be inserted, and follow steps 4-6.

3 Ways to Create/Add Records to an EndNote Library

- Manually
- Via Connection Files
- Via Import Filters (Automatic or Manual)

FAQs

How do I know whether to use a Connection File or a Filter?

A connection file will almost always be used with a library catalog and/or free resource such as PubMed. A Filter will be used with a proprietary database with password protection.

How do I know whether a filter is Automatic or Manual?

Automatic Filters are offered in the following families of databases: FirstSearch, ProQuest, ISI, Ovid, and EBSCO. It is not necessary for you to know whether the filter is automatic or manual before searching the database. If you find yourself searching a database that will simply not "Export" automatically, you will need to look up the filter downloading information in EndNote's filter manager.

Tip: If you download a filter (Save to Program Files -> EndNote -> Filters), you must close the program and re-open it in order for it to take effect.

To Download Filters:

Columbia Libraries Filters Page

<http://www.columbia.edu/cu/lweb/help/howto/endnote/filters.html>

EndNote Filters Website

<http://www.endnote.com/support/enfilters.asp>

System and Hardware Requirements

- Windows 2000 and XP
- Pentium 450-MHz minimum
- 180MB hard disk space available
- 256 MB RAM
- CD-ROM drive
- Internet connection required to search Internet databases
- EndNote 9 files are compatible across Windows and Mac OS X platforms
- EndNote 9 is Unicode compliant

Downloading Procedures for Key Databases

CLIO (Connection File)

- Open your EndNote library.
- Select the connection file by going to Tools -> Connect.
- Select CLIO from the list and click Connect.
- Perform a keyword search.
- Select the records you wish to be added to your EndNote library by holding the Ctrl key to select multiple records.
- Click the button on the top right to Copy References to your EndNote library.

ProQuest (Automatic Filter)

Includes ABI Inform, Digital Dissertations, Historical Newspapers

- Open your EndNote library.
- Go to ProQuest (LibraryWeb -> Resources -> Databases).
- Conduct a search and select multiple records by checking the boxes.
- Click the "My Research" tab at the top.
- Click the "Export citations" link at the top.
- Select "Export Directly to ProCite, EndNote, or Reference Manager."
- Browse to select yourlibrary.enl (In Program Files -> EndNote).

Ovid Databases (Automatic Filter)

e.g., Health & Psychosocial Instruments, MEDLINE, PsycINFO

- Select multiple records by checking the boxes to the left of citations.
- Locate the Results Manager at the bottom of the page.
- Use the following settings--Fields: Complete Reference; Result Format: Direct Export.
- Click the Save button to download your search results.
- Select the option to "Export results to Endnote, Procite, or Reference Manager," then click on "Continue."
- Select appropriate EndNote Library.
- Select the PsycINFO (Ovid) filter, then click on "Choose."

CSA Databases (Manual Filter)

e.g., Sage Full Text Collections, Social Services Abstracts, Sociological Abstracts, WorldWide Political Science Abstracts

- Select multiple records by checking the boxes to the left of citations.
- From the CSA search results screen, click on the "Save/Print/Email" link at the top of the page.
- On the "Save/Print/Email" screen, select the following--Records: Marked or All Record; Format: Full Format; Bibliographic Style: your choice; Save File Format: PC or Mac (as appropriate).
- Click the "Save" button to save results as a .txt file.
- Open EndNote Library.
- Select "Import" from the File Menu.
- Click on "Choose File" to locate the .txt file.
- Under "Import Option," choose "Other Filters" to go to the complete list of Import Filters.
- Choose the appropriate CSA database filter.
- Click on "Import" to import the citations from the .txt file.