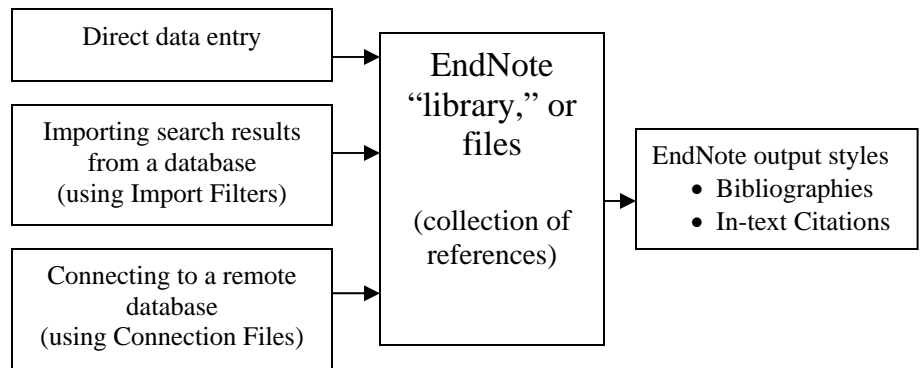


ENDNOTE FOR MAC

- ✓ Creates bibliographies
- ✓ Manages bibliographies
- ✓ Can be used with MSWord to generate notes as you write, "cite while you write"



Creating Bibliographies From scratch

- Open EndNote; File/New and name a new "library" (Bibliographies are called "libraries"). You will be "saving" a file when you create it, so specify where you want it saved at this time.
- Select your format style (Chicago, Ecology, etc.) from toolbar, or Edit/Output Styles/Open Style Manager
- Go to References/New Reference, or off toolbar
 - Select reference type (Book, Journal Article, Electronic Source, etc.)
 - Field options change to match the information that that type requires
 - Type information in the fields
 - Author's name is last name, first name
 - Enter multiple authors on multiple lines
 - Enter additional elements that you might want: keywords of interest to you, class or group name, where you have a copy of it filed, etc.
 - Click on "x" to close New Reference window
 - New reference becomes part of "library"
 - EndNote saves as you go

Creating Bibliographies by Using Import Filters

To take records from a database to use in an EndNote library, you have to EXPORT the records from the database and then IMPORT them into EndNote. EndNote has Import Filters for most of the databases. As additional filters are added on the EndNote website, you can download them from:

<http://www.endnote.com/support/enfilters.asp>. See below for instructions on how to download and add new import filters.

- **Only way to search fee-based databases and import records into EndNote when you're using the proxy server or blue socket**
- You can use EndNote Connection Files with the VPN but you then lose the functionality of the databases. Import Filters are a better way to go.
- This doesn't seem to work well in Mozilla

Exporting from the database

Each database will be a little different when it comes to exporting. Try a few things until you get it right.

- Some databases will automatically go into EndNote (ABC-Clio, OCLC). Most won't.
- Search the database as you normally would
- Mark (tag, select) the records you want
- Go to Save, Output or Export
- Export the files or save as text (.txt) files
- Import the files into EndNote
 - You will have to export it into an existing "library"
 - Diacritics are sometimes lost

Examples of exporting from a database:

1) Search Pegasus

- Select items and click “Add to my list”
- When finished, click tab “View my list”
- Click Mail
- Email yourself the records in MARC tag format
- Open your email
- Copy & paste the text into Word
- Save file as a TEXT (.txt) file
- Open EndNote
- Follow directions below for importing a file
- **Use the Harvard U. import filter to import your records from Pegasus

2) Search Sociological Abstracts

- Click “Save, Print, E-mail”
- Choose document format TEXT
- Click Save – give it a custom name so subsequent csa searches don’t overwrite the file
- Go to EndNote
- File – Import
- Import Data File – Choose File
- Import Option – Other Filters
- Scroll to Sociological Abstracts. Make sure you use the CSA one since that is our database provider
- Follow directions below “to import a saved text file”
- CSA information will not appear correctly in Endnote. You will have to change reference type to: JOURNAL ARTICLE and copy & paste journal title, volume, pages from the NOTES field to the proper fields

3) Search Historical Abstracts and tag desired records.

- Click “Export Options”
- Select EndNote
- Click “Send”
- Then click “Export to Citation Manager”
- Open the downloaded file
- Select Open with EndNote (if you are prompted)
- Open the desired EndNote library file

4) Search Expanded Academic (InfoTrac)

- Click Print or Email
- For e-mail options select Citation
- Send yourself the citation(s)
- Open the e-mail
- Copy and paste citations to Word
- Save as a TEXT (.txt) file
- Follow directions below “to import a saved text file”

To import a saved text file:

- open your library
- go to File/Import
- click your saved file
- IMPORTANT STEP: click on Import Option/Other Filters... and select the filter for your database from this list
 - If your database or database provider is not on this list, you'll have to add a new import filter. See below
- select a Duplicates option
- Select a translation option
- click on Import
- Only the newly imported references will display in your Library; to view all, press References/Show All from the menubar (or Shift-⌘-M)
- Import filters are not available for all databases (e.g., Hispanic American Periodicals Index)
- For these one must cut & paste or type in data

You'll have to do a little clean-up. The journal title, year, volume and pages for all CSA imports will be in the Notes field in EndNote. Just look at each record and pay attention.

Adding Import Filters

Your version of EndNote might not have the most recent version of an import filter. To add these you must go to <http://www.endnote.com/support/enfilters.asp>

- Import filters are sorted by date they were added to EndNote list. Re-sort either by database (MLA) or Information Provider (Ovid)
- You will only have to do this ONCE for each needed Import Filter.
- EndNote just has pages numbered – can't jump by letter
- FTP the import filter to your computer
- Save import filter in C:\Program Files\EndNote\filters
- you'll need to close EndNote and reopen it to get the Import Filter to work

For more information about how to use EndNote with specific databases, see the UC Davis online guide:

<http://www.lib.ucdavis.edu/dept/instruc/research/endnote/connect.php>

They have separate links to information for Windows and for Mac users

Creating Bibliographies by **Connecting to a remote database**

Does **not** work with the proxy server

Does work with the VPN

Might not work with blue socket

Does work with free databases like Melvyl and Library of Congress

You can search other databases by using the EndNote interface

- Pro: allows users to just know one interface and apply to many databases
- Con: users lose special functionalities of individual databases

When in the library, first log in to blue socket, then minimize that window and open EndNote.

- Tools → Connect → Connect...
 - List of connection files appears
 - Select the one you want
 - note: U of CA might not be the current file
 - WorldCat
 - Leave username and password blank if on campus
 - Type in search terms
 - Use “insert fields” if you want to search more fields
 - Select references you want (highlight – hold down Ctrl to highlight several)
 - Click “Copy x References to” and select your “library”
 - Go back to search database.
 - WARNING: EndNote will now be searching your “library” not the database. Look at the top of the window to check what you’re searching. If it’s not the database, you’ll need to reconnect.

Adding Connection Files

New versions of databases appear all the time and EndNote won’t know how to communicate with them. You have to add the additional Connection Files to EndNote.

- One that you will want to add: Pegasus
 - This one is not on the Connection Filters list
 - Get a copy from Davidson Library (email Anne)
- Go to <http://www.endnote.com/support/enconnections.asp>
 - Connection files sorted by date they were added to EndNote list. Re-sort either by database (MLA) or Information Provider (Ovid)
 - EndNote just has pages numbered – can’t jump by letter
 - FTP the connection file to your computer
 - Save connection file in C:\Program Files\EndNote\Connections
 - You’ll need to close EndNote and reopen it to get the Connection file to work
 - Search new connection file just like the WorldCat example above

Import format – important for diacritics

- Connection files can be edited (Edit --> Connection Files) and you can adjust capitalization of titles, name order, diacritics, etc (Library of Congress defaults don’t work well for Spanish)
 - If diacritics aren’t working well for you try editing the Connection Settings of the Connection File
 - Alternate between Text Latin-1 and Text ANSEL to see if one works better than the other for the diacritics

Generating Bibliographies from an EndNote Library

EndNote can be used to generate bibliographies in numerous different citation formats; this is a good way to produce an annotated bibliography of selected titles from an EndNote library:

- Use Ctrl F to search for records within a library, or, select specific references you want: highlight desired records (hold down Ctrl or Shift to highlight several); then go to References/Show Selected
- To select a format, go to File/Output Styles (or from the toolbar)
- You can edit the particular output style if you need a modified version: File/Output Styles/Edit . . .
- With “library” open, go to File/Export to save records and create a bibliography:
 - Save as .rtf
 - Go to Word and open your document

Cite While You Write: lists of works cited (using MS Word)

- EndNote builds your bibliography as you write your paper
- EndNote will format the references to match the output style you have selected
 - Make sure you have selected the output style you want – do you need parenthetical in-text citations?)
- Use EndNote toolbar in Word to insert a citation
 - Find Citation (Word should toggle over to EndNote, if not you can open it)
 - Highlight it in EndNote
 - Insert selected citations
- If you tell Word each time you are referring to a title in your EndNote library, EndNote will put a code in the Word document at that point linking it to the library. If you erase that sentence/paragraph/reference, EndNote erases the linking code and thus removes the title from the bibliography
- “Format bibliography” in EndNote toolbar
 - Default is “instant formatting” and with this you don’t see the EndNote codes
 - Disable this feature each time you use it!

Cite While You Write: footnotes and endnotes (using MS Word)

- EndNote will not automatically create footnotes or endnotes
- Use Word command Insert → Reference → Footnote → Insert
 - With cursor at bottom of page in footnote use EndNote toolbar
 - Insert selected citation
 - To add page numbers, use the arrow keys to go into the bracketed citation {...} add “@” and then page numbers within the brackets: {Smith... @33-34}
- EndNote will format notes to match the output style of the other citations
- When you are finished, use Format Bibliography for whichever style you want

**Installation note: EndNote for Mac has odd installations. Follow the directions on the CD very closely; it is not intuitive.