

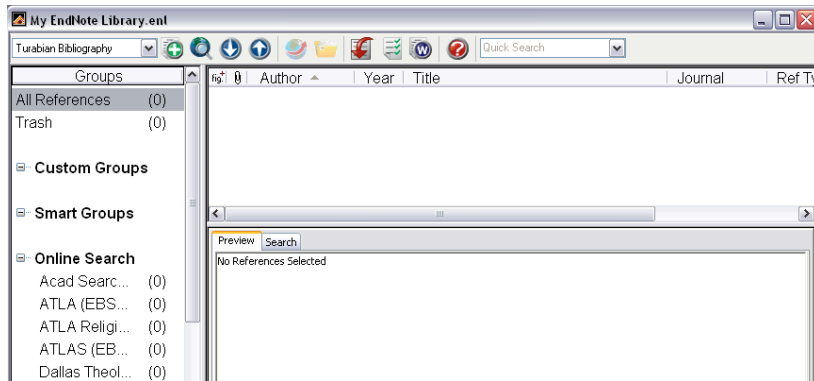
NOTES ON ENDNOTE X2

EndNote automatically creates and formats both footnotes and bibliographies. To use it, (1) create the references you want; (2) insert them into your document, (3) create a bibliography, and (4) edit errors.

1. Creating References

Before you create references, you must create a database of references, called an EndNote library. There is no limit to the number of libraries you can create or to the number of references you can add to a library. Use a different EndNote library for each paper that you write.

To **create an EndNote library**, choose New under File in EndNote and name your new file.

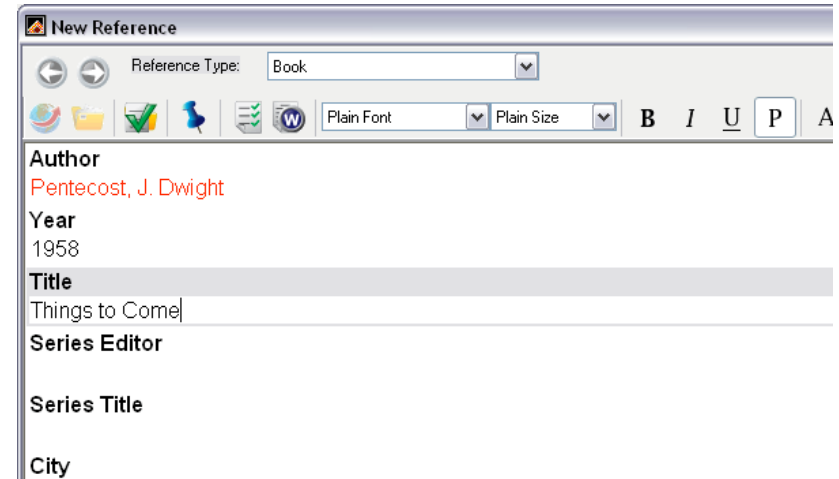


A new file named My EndNote Library

Then enter references into it. You can create references manually, import them from another EndNote file, or download them from online databases.

By Manually Typing the References

To **create a reference manually**, choose New Reference under the References menu. A New Reference window opens. Choose the reference type you want and fill in the fields you want to specify. (Tab to each field.) Close the reference window to add it to the open EndNote library.



An entry for *Things to Come*

By Importing from Another EndNote Library

To **find references** already in an EndNote library, open that EndNote library and choose Search Library from the Tools menu. Fill in the fields you want to use. Click Search. When the list of hits comes up, select the ones you want. Copy and paste (from Edit or by right-clicking) from one EndNote library into another.

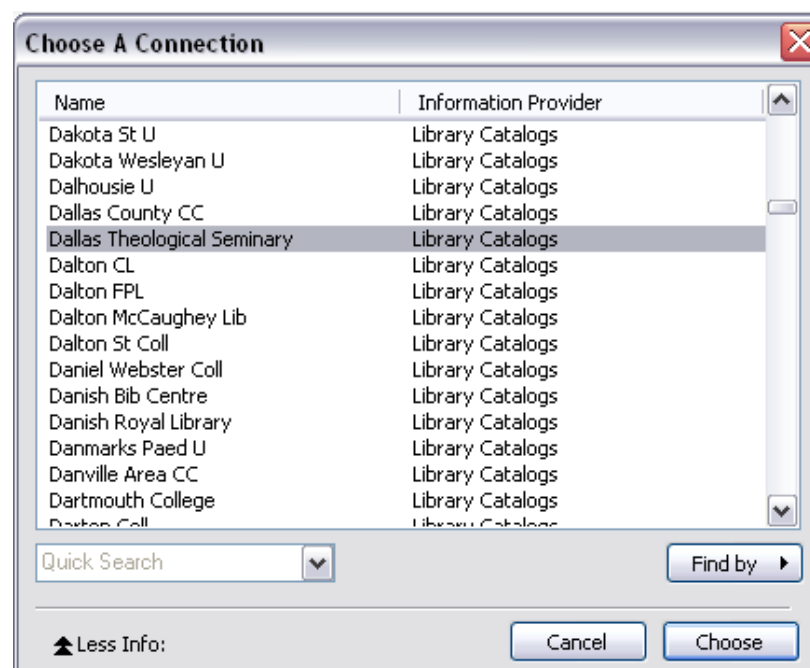
By Downloading from a Search

EndNote imports records from online databases two different ways. One method uses z39.50 connections. The z39.50 connection lets you execute a z39.50 search from within EndNote (without using the web or your web browser). Results immediately and automatically appear in your EndNote library. The z39.50 search typically offers limited search operators (logical operators, no proximity operators, no nesting of terms, other limitations), but getting the results into EndNote is as simple as possible. In some cases the connection files require a tiny bit of configuration before you use them the first time. After that they are very easy to use. There is a major limitation. If you are on the DTS campus, you can use this approach to connect to EBSCO and OCLC FirstSearch databases. If you are off campus, you cannot use it for EBSCO or OCLC FirstSearch databases. Off campus, it will fail to authenticate. (It is using the DTS campus IP address to authenticate.) No matter where you are, you can use it to connect to resources that require no authentication (this includes BIBLOS and hundreds of library catalogs).

Another method uses filters. The approach requires you to do a search using your web browser and whatever search engine the database provides. You must then save the records you want using a save or export command the database provides (e.g. save them to your desktop). Finally, you must start EndNote and open the saved file using a filter to translate record format and put the records into an EndNote library. So the filters require a multi-step procedure every time you want to add records: search in a browser, save, start EndNote and import. But they let you use the full power and features of the database search engine. Filters work exactly the same way whether you are on or off campus. You can use them anywhere: campus, home, work, etc. You do not have to be on campus to use EBSCO or OCLC FirstSearch databases. This is the reason we suggest you learn to use the filter approach even though it has more steps than the z39.50 connection approach.

Using a Z39.50 Connection: Many library catalogs and other databases allow downloading through a z39.50 connection. To connect to one of these databases, first open an EndNote library and choose Online Search under Tools on the main menu. EndNote comes with pre-configured connection files to many reference databases. Select a name and click Choose. The

Connect command will automatically establish the connection, and EndNote will open the Search portion of the window below the EndNote references. After you have used a connection file once, it will appear under Online Search on the left-hand side of any library you open.



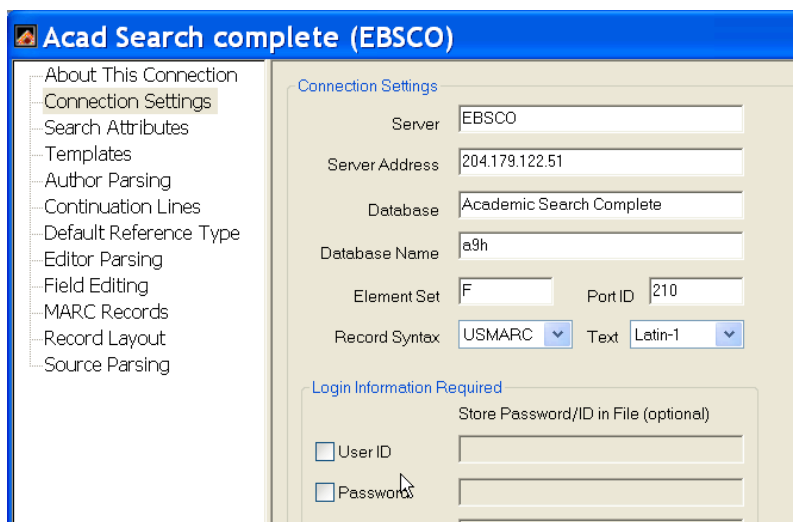
The list of connection files

Execute the Search command using the search terms appropriate for your search. When the Confirm Online Search box comes up, click Cancel to refine the search or click OK to retrieve references. EndNote adds them to your library, and you may open any references in it by double-clicking them. Choose references you would like to delete by holding the <control> key while clicking with the mouse over them. Or use <shift> to select contiguous entries. Right click and choose Move References to Trash.

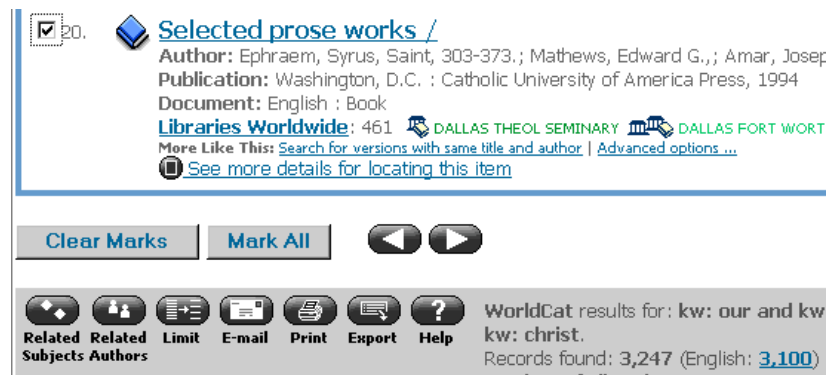
However, you may encounter configuration problems.

First, the proper connection must match the database **exactly**, even the exact vendor and version of the correct database. For example, since we access ATLAS through EBSCO, you must pick ATLAS (EBSCO) (the full text version of ATLA), not ATLA (EBSCO) or ATLA Religion (OCLC). Likewise you must pick Academic Search Complete (EBSCO), not Academic Search Premier (EBSCO) because we subscribe to the “complete” edition but not the “premier” edition.

Second, you must be on campus to use EBSCO and OCLC connection files. If the box asking for a password comes up, just hit <enter>. To keep the box from popping up, go to Edit—Connection Files—Open Connection Manager and click on the name, not the box, of the connection file you want to change. Click Edit. Click Connection Settings on the left. Uncheck the User ID and Password fields. For example:



Using Filters: To use WorldCat or any other database to which DTS has a subscription, you may go to the database directly through the library website. If the following does not work properly in one browser, try another. If you use Zotero in Firefox, for example, your records may be exported there. Go to <http://library.dts.edu> and click on the database you want, e.g. WorldCat, from the dropdown list of databases. Login using your ID# and password if you are off campus. Then search, and mark the citations in which you are interested. Click Export. Choose Marked records under Export and EndNote under Export To. Click Export. A File Download window opens to allow you to open or save your results. Click Open. EndNote will open and ask you to select an EndNote library. After you select one, it will ask you to choose the filter through which it will import the data. Choose the filter that has the name of the database and search engine you are using (e.g. WorldCat-OCLC). EndNote adds the citations to the library you opened.



A WorldCat search. The Export button is at the top or bottom of the screen.

To download references from ATLA, search ATLA and click Add to Folder beside citations you wish to keep. Click Folder View in the right-hand column. Select the records you want and click Export. Choose Direct Export to EndNote. EndNote will open. When you open an EndNote library, your citations will be added automatically.

2. Inserting Footnotes

After you have the citations for your document in an EndNote library, you are ready to add footnotes. You may add footnotes after you finish the document or as you go. To add footnotes, open the EndNote library you created for your document (File – Open – Name of Library). Open the document and place the cursor in the document where you would like a footnote.

To **add a footnote**, insert a footnote with your word processor. Then click the Find Citation(s) icon. Select the citation you want and click Insert.

Alternatively, to choose a citation, you can go to the EndNote program directly and click on the reference. Then click the Insert Citation icon.

To **add page numbers** to a footnote, click the footnote. Click the Edit Citation(s) icon. A window pops up with a field for page numbers. Enter the page numbers and click OK.

3. Formatting Footnotes and Creating the Bibliography

As you enter citations into your document, the bibliography appears below the text. Format it by choosing the Format Bibliography icon on the Toolbar. Choose a bibliographic style from the dialog box and click Format. EndNote formats the citations for the footnotes and the bibliography. If you want to change the format later, go to Format Bibliography and choose a different style.

If the bibliographic style you want does not appear on the list, click Browse and add it.

4. Editing Footnotes and Bibliography

It is best to correct the entries in your EndNote library before adding them to your document. If you edit an EndNote citation in a footnote directly, you will lose your corrections when you reformat. You may, however, edit a footnote or bibliography with the citation unformatted. See the documentation from EndNote for this.

EndNote adds field codes to your document as you add citations. If you work on the document on another computer or in a different version of Word; or if you send it in electronic form to someone else, you should remove the field codes first. Click the Remove Field Codes icon on the toolbar. However, this means that you cannot reformat later and that the text is as if typed in. Therefore, to keep the flexibility of EndNote in the original document, make a copy and remove the field codes from it.