Advanced EndNote Tips

Once you have downloaded an RIS file and opened it, the information is transferred to EndNote, and the RIS file itself is no longer necessary. To keep your computer from becoming cluttered, you can delete RIS files once you’ve opened them.

It’s a good idea to create “groups” in EndNote in which to store your references so you can keep them organized either by subject or by project.

To create a group, click on the “Groups” tab at the top of the screen.
Once you’ve created and named your group, you can add references to it by right-clicking on the reference and hovering over “Add References To,” which will give you the option of selecting the group you’ve created.

You can edit references if they contain errors. That way, you can ensure that the errors are not duplicated when you export the references into a document. For example, look at this reference:

You can see that the title has been cut off at the word “A.” Double-click on the reference to edit the title and add the missing words, “Framework and Checklist of Activities.”
Remember: EndNote is a powerful and useful program, but it will still be your responsibility to ensure that all of your citations are correct!

And speaking of correct citations, EndNote has an enormous library of citation styles, but only a few will initially show up as options. To discover the rest, select “Edit” from the dropdown menu and then hover the mouse over “Output Styles” and select “Open Style Manager.”

This will reveal a huge list of available citation styles, including, you may notice, six variations on APA. If you are using APA style in your work, the version of APA you are most likely to find useful is “APA 6th – Sentence Case.” Sentence case refers to the style

<table>
<thead>
<tr>
<th>Rating</th>
<th>Journal Article</th>
</tr>
</thead>
<tbody>
<tr>
<td>Author</td>
<td>Fagan, Jody Condit</td>
</tr>
<tr>
<td>Year</td>
<td>2000</td>
</tr>
<tr>
<td>Title</td>
<td>Guidelines for Creating a Self-Directed Training Program for the New Reference Librarian: A Checklist of Activities</td>
</tr>
<tr>
<td>Journal</td>
<td>Reference Librarian</td>
</tr>
</tbody>
</table>
depicted in the APA manual, in which the words of titles are lowercase except at the
beginning or after a colon.

Simply make sure that the box is checked next to each style you want to be able to use,
and then it will appear as an option both in EndNote itself and in the Cite While You
Write plugin in Microsoft Word.

A reference in APA Sentence Case will look like this:

Gottfried, J. C. j. g. w. e. (2013). The plugged-in reference librarian: Who do we think we
are? Reference Librarian, 54(4), 308-319. doi:10.1080/02763877.2013.767766

The above is an example of a reference created with EndNote using APA Sentence Case.
If you compare it against the APA manual, you will see that it is correctly formatted and
contains all the proper elements—or does it? Notice the string of extra, lowercase initials
after Dr. Gottfried’s name. If we go back to EndNote and double-click this reference to
open it, we can discover where these initials have come from:

Remember, the metadata in these references has been generated by a computer, so it is
not surprising that some unexpected artifacts have shown up. In this case, the computer
has mistaken Dr. Gottfried’s email address for part of his name. Again, we can edit the
reference by simply deleting the extraneous words.
In Microsoft Word, if we look at the Cite While You Write plugin, one option is to “Update Citations and Bibliography.”

Once we have made the alteration to the reference in EndNote, clicking this “Update” button will automatically correct the citation, so now it looks like this:


Now that’s a proper reference, and Dr. Gottfried has the correct number of initials.

Note that EndNote will not automatically recognize proper nouns or acronyms, which still require capital letters in sentence case. For example, take a look at the following reference:

If you simply try to edit references like this by fixing the capitalization in your Word document, the reference will revert to its original form whenever the references are
updated. However, we can build a library in EndNote of special words that need to be capitalized.

Open the “Edit” tab on the dropdown menu and select “Preferences…”

In the Preferences menu, choose the first option, “Change Case.” This will take you to a list of words whose case will not be altered by the reference style. You can see that DNA and USA are already in the list automatically. We can add Germany and Europe to the list, and in the future, we can add any additional proper nouns that appear in titles.
Once we have added these words, we can look at the reference again and see that the capitalization is now correct:

One more thing we should discuss is putting in a reference manually; after all, you may sometimes cite physical books or articles, or even digital copies that do not come with RIS files. We can input data directly into EndNote by selecting “New Reference” from the “References” dropdown menu.

This brings up a form we can edit. The first thing to do is select the correct kind of reference from the menu. For example, we can choose a book:
After we make this selection, we can then enter the appropriate metadata in each category.

It is also possible to import RIS files from the library catalog here at NWOSU. So, for example, we will here import the RIS file for the *International Encyclopedia of Information and Library Science*. 
It is possible to export RIS files from the catalog in much the same fashion that you export them from the online databases. The word “cite” at the top of the screen will bring up a dialog box, giving you the options both of exporting to EndNote or of downloading an RIS file.

When you acquire the file, you can load it into EndNote just like other RIS files.

There is another way to acquire RIS files for books and other resources, and that is to load up the WorldCAT catalog by going through your web browser to worldcat.org. If you search for this same book on the WorldCAT system, you can find an entry for it that will also give you a cite/export option:

Selecting this option on WorldCAT should enable you to download an RIS file and save you the trouble of inputting information about the book manually. Once again, double check to make sure EndNote is producing a proper citation, and edit if necessary.

For example, you may notice that the citation produced automatically by EndNote does not include the edition:
You can add this information manually by editing the reference:

Now the citation looks like this:

Finally, note that the Cite While You Write plugin in Microsoft Word enables you to link together your in-text citations with the entries in your bibliography. Click the small arrow in the corner of the Bibliography panel.
This will give you the options to choose your output style for your references, and also to link your references with your in-text citation. This produces an invisible hyperlink that makes it easy to jump back and forth between the in-text citations and the references at the end of the document.

There are many other features in EndNote that make it a powerful (if sometimes challenging) program that can help you maintain your research sources into the future, but these are some beginning tips to get you started. In time, with the help of this
program, you will build a personal information library that will greatly aid your research both now and in your future career.