Instructions for Using EndNote 7.0 and WordPerfect 11 for ECCB Bibliographic Citations

Endnote is a software package that allows the user to manage bibliographic citations (works cited in bibliographies and footnotes). Citations can be entered manually or downloaded from select databases, and stored to be reused in whatever standard style (for example, APA, MLA or for ECCB, Chicago format) is required for a given writing project.

EndNote can be used to search select library catalogs (such as the Library of Congress) for book titles, journal articles and other reference types. Instead of typing each individual search result into WordPerfect, searches can be formatted in EndNote, saved as a library file, then imported into WordPerfect.

In some cases, when using select databases such as America: History and Life (AHL) and Historical Abstracts (HA), search results can be saved into a data file. Entries can be imported into EndNote, formatted appropriately, saved as a library and imported into WordPerfect.

Topics to be discussed are as follows:

1. Basic Instructions for Using EndNote
   a. Starting EndNote
   b. Creating New EndNote Library Documents
   c. Opening Existing Libraries in EndNote
   d. Connecting to a Library Database Using EndNote
   e. Searching the Library Database in EndNote
       i. Entering Search Parameters
       ii. Retrieving Search Results from Library Databases
       iii. Reviewing Search Entries
       iv. Downloading Search Results into EndNote
   f. Running a Search Using Other Databases Outside of EndNote (ex: AHL, HA)
       i. Searching in AHL and HA
       ii. Reviewing Search Entries
       iii. Choosing an Output Type
   g. Importing ABC-Clio Data Into EndNote
       i. ABC-Clio Filter Check
       ii. Installing the ABC-Clio Filter
       iii. Importing ABC-Clio Data Into EndNote
   h. Changing Styles in EndNote
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       i. Transferring all entries
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2. Basic Instructions for Formatting ECCB Documents in WordPerfect
   a. Starting WordPerfect
   b. Importing Entries into WordPerfect
   c. Saving Exported Entries (*.rtf) in WordPerfect (*.wpd) format
   d. Formatting Documents According to ECCB Guidelines

1. **Basic Instructions for Using EndNote:**

   a. **Starting EndNote.**

      - Double-click on the EndNote icon on your desktop:
      - If you do not have a shortcut on your desktop, go to START ⇨ PROGRAMS ⇨ "EndNote" then "EndNote Program".

   b. **Creating New EndNote Library Documents**

      - Click on FILE ⇨ NEW. Alternatively, click on the ⬜ icon on the toolbar.
      - A "New Reference Library" window opens. Change the SAVE IN folder as needed.

        Note: The default SAVE location is within the main EndNote folder. If you save your files in other locations (ex: My Documents), point to that folder.

        Note: Clicking on any of the icons on the left-hand folder bar (History, Desktop…) will also change the SAVE IN folder location.

      - Type in a filename for your new library.
      - Under SAVE TYPE AS, choose "EndNote Library (*.enl)".
   - Click on SAVE or hit the ENTER key.
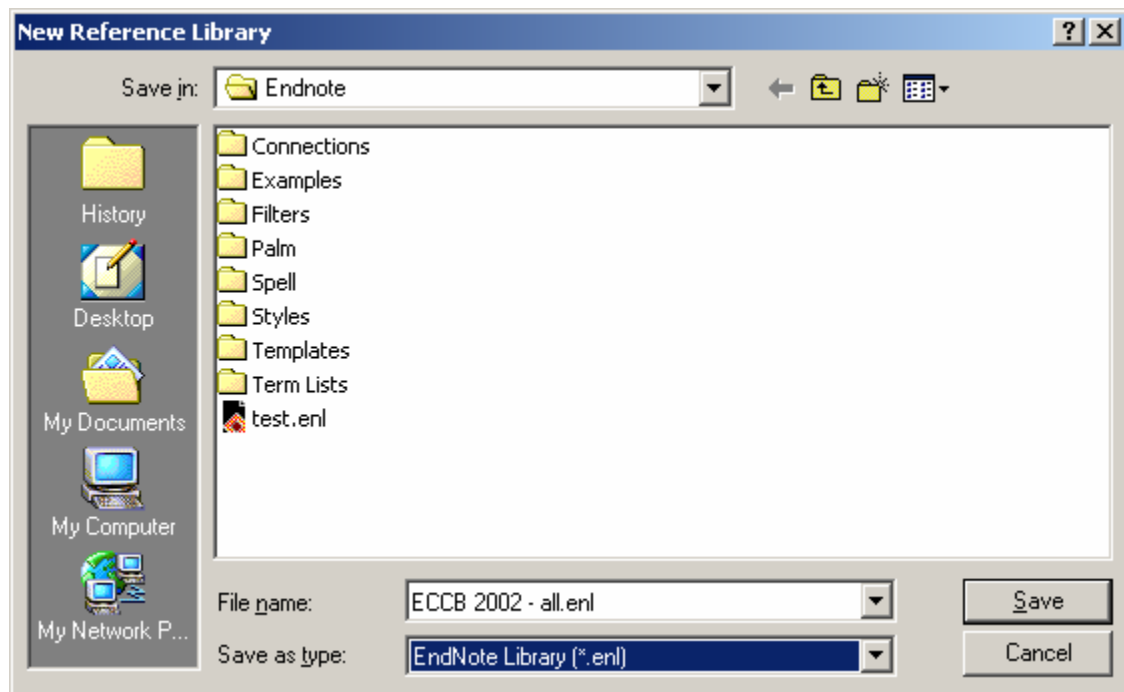
   c. **Opening Existing Libraries in EndNote**

      - Click on FILE ⇨ OPEN. Alternatively, click on the 📂 icon on the toolbar.
      - To open a previously used library, click on one of the files from the drop down list.
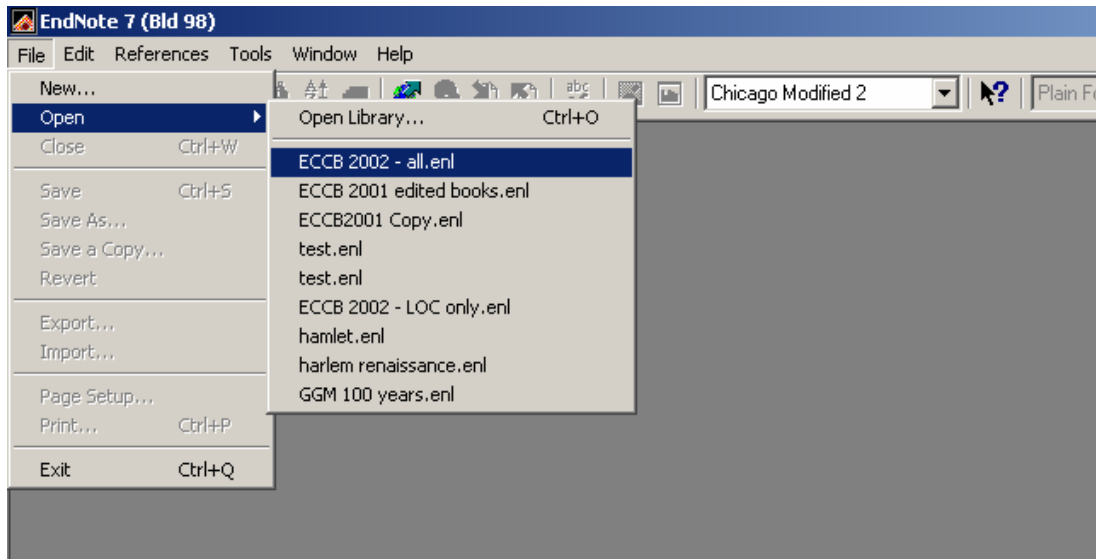
- Or, to go to a list of library files, click on "Open Library…" or hit CTRL+O.

- The "Select a Reference Library" window opens. Change the LOOK IN folder as needed. Alternatively, click on any of the icons in the left-hand folder bar.

- Click on the desired file then click on OPEN or hit ENTER. Alternatively, double-click on the file to open.
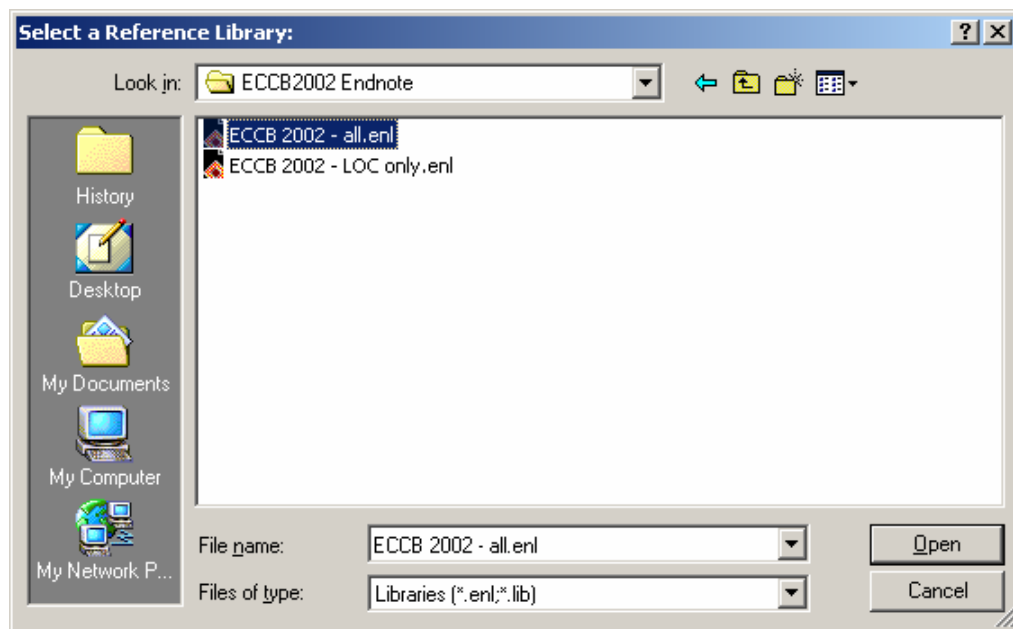
d. **Connecting to a Library Database Using EndNote**

- Go to TOOLS ⇨ CONNECT.

- To go to a previously used database, click on one of the databases from the dropdown list.
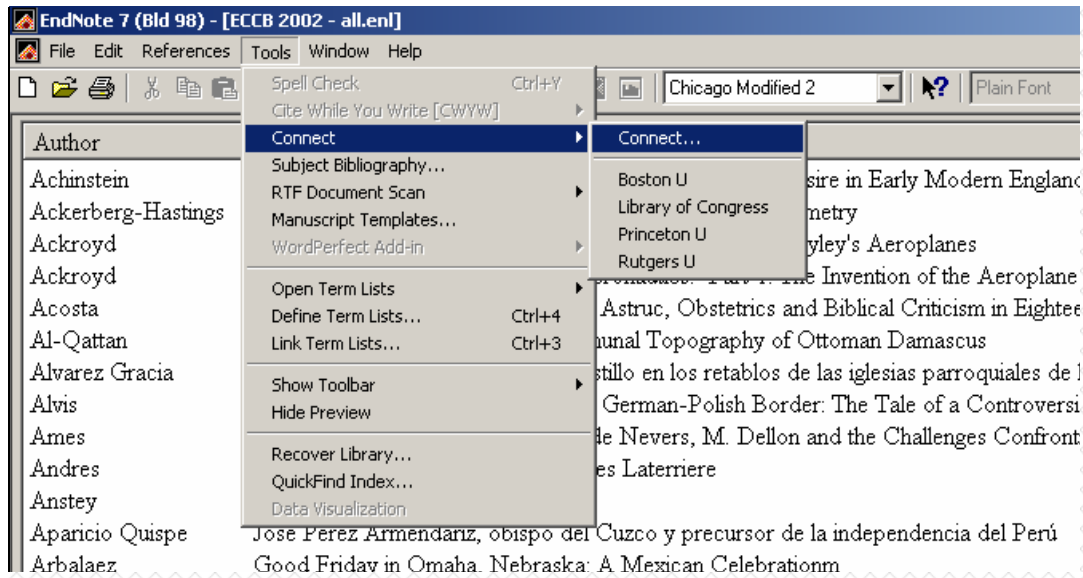
- To see a list of all available database catalogs, click on "Connect…"

  Note: The different database catalogs are listed in alphabetical order.
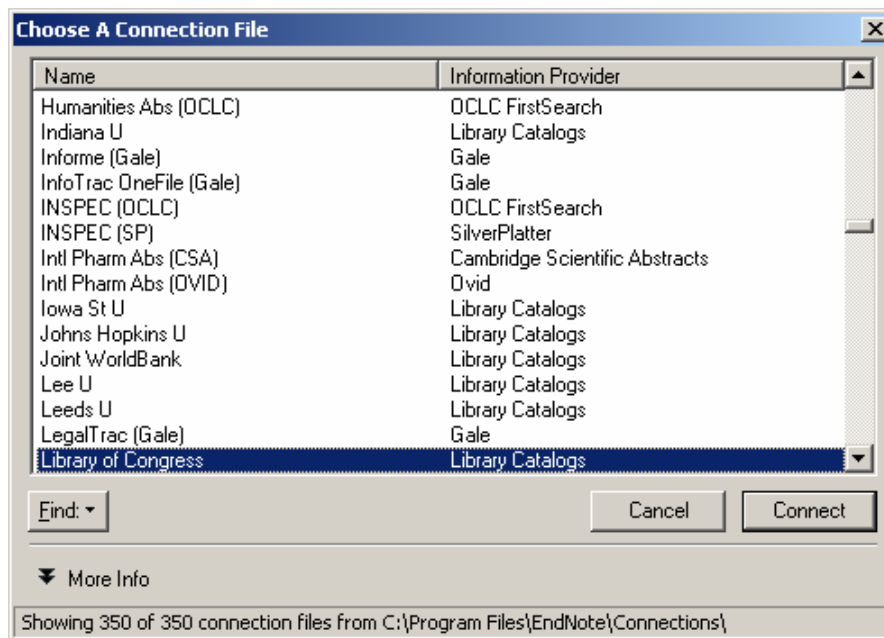
- Choose the desired database then click CONNECT.

e. **Searching the Library Database Using EndNote**

   i. Entering search parameters

   - Enter the search parameters.
     For example, you want to run a search using the general term "religion" <u>and</u> the
     keyword term "eighteenth century". In the first search field, type in "religion"

under ANY FIELD. Click on "And" then go to the second field. Change ANY FIELD to KEYWORDS then type "eighteenth century" beneath it.
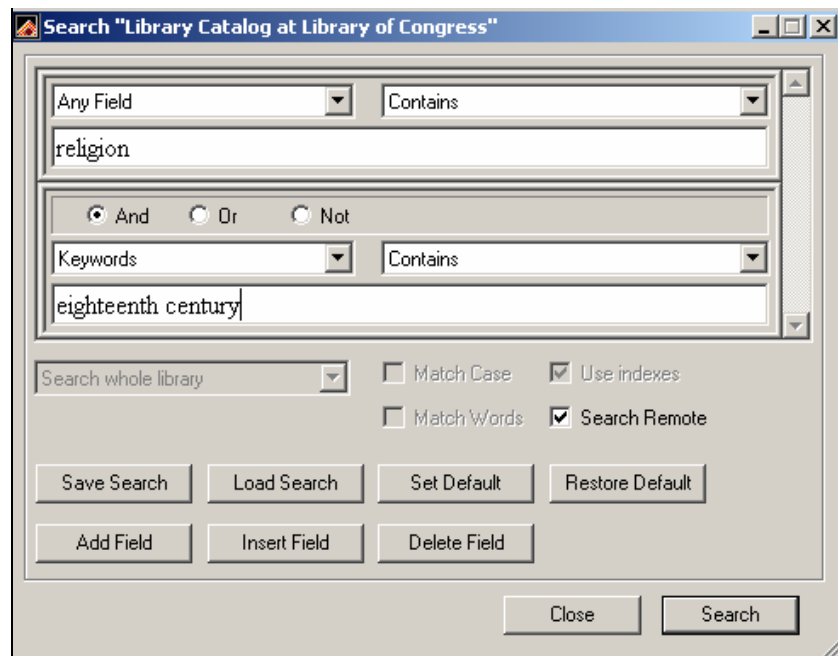

- Always make sure one of the Boolean expressions between fields are chosen:
  ⊙And   O Or   O Not

Note: In the example above, the term "And" will find references with "religion" in any field *and* "eighteenth century" in the keyword field.

The term "Or" will find references with "religion" in any field *or* "eighteenth century" in the keyword field.

The term "Not" will find references with "religion" in any field but will *exclude* items with "eighteenth century" in the keyword field.

- If you have more than two search terms, you will need an additional field for each extra term.

  ◆ To add fields: Click on ADD FIELD.

  ◆ Additional search terms may be added once extra fields have been inserted into the Search dialog box.

- Click CLOSE to cancel at any time.

- When all search terms have been defined, click on SEARCH or hit ENTER to start the search. The following dialog box appears, listing the number of references found, as well as the number of references to retrieve:
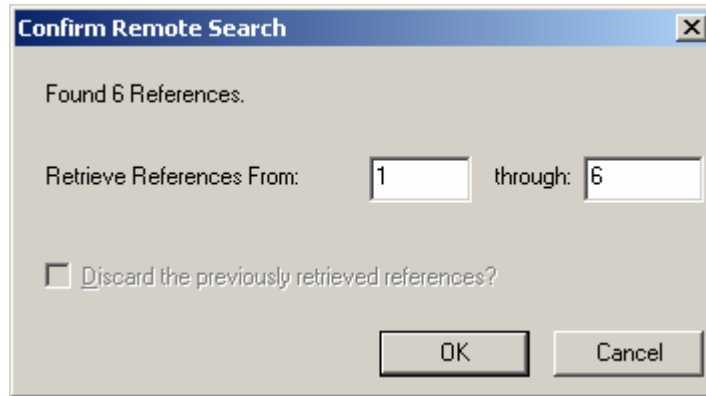
ii.   Retrieving Search Results from Library Databases

- All references may be retrieved at once or in smaller segments.

  - To retrieve all references, click on OK.

  - To retrieve segments, change the numbers in the "Retrieve References From" and "through:" spaces above. Click on OK to retrieve the references.

    For example, if your search came up with 100 references, you may want to just look at the first twenty-five. Retrieving in segments will speed remote reference downloading from the library catalog.

  - To retrieve other segments, switch to the "Search X Catalog" window, where X is the remote library you are connected to.

  - Click on SEARCH then choose the next set of references to retrieve in the "Confirm Remote Search" window. Repeat as necessary.

- EndNote will retrieve the references from the remote library catalogs. A new window will appear with the references:
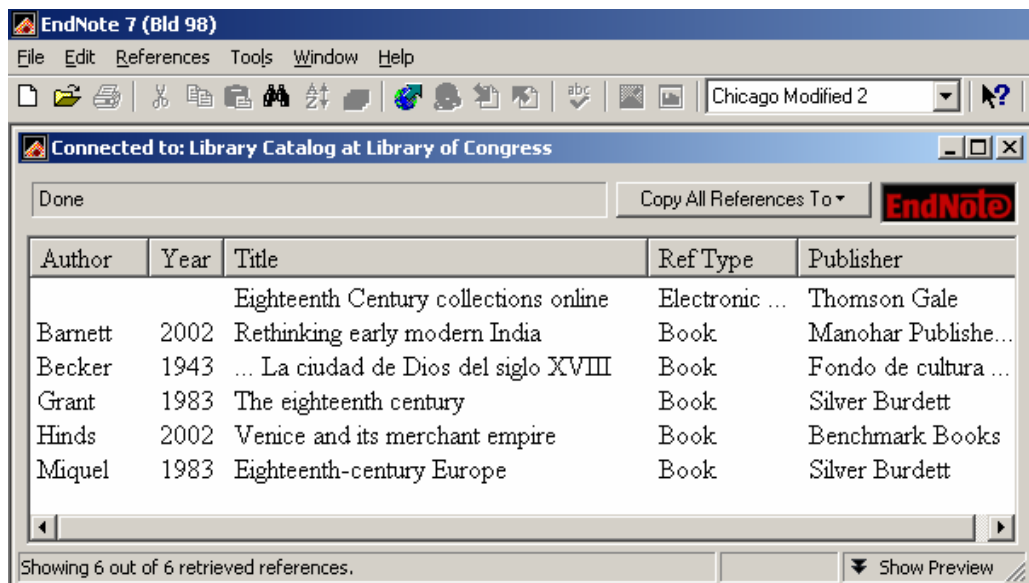
iii. Reviewing Search Entries

- To review an item, click once on a reference, then hit ENTER. The following dialog box will appear with the reference information.
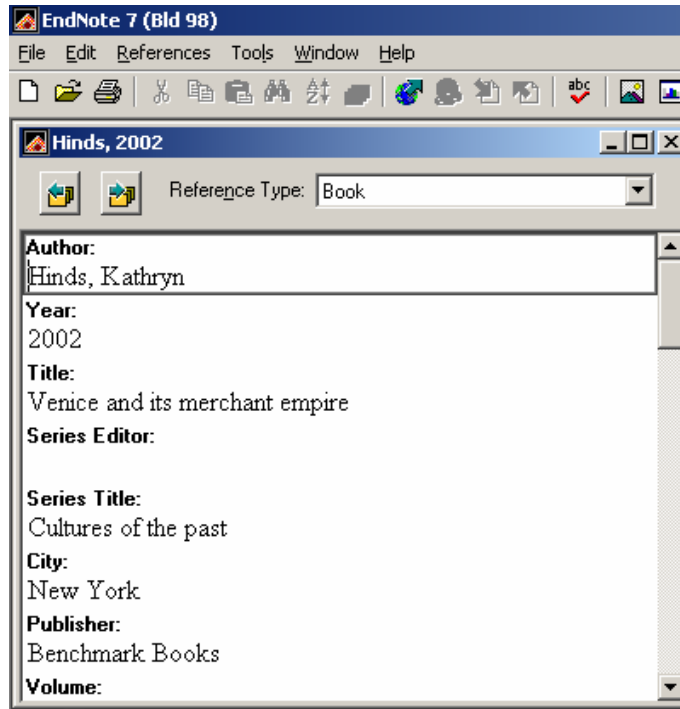

- To close the reference, click on the ⊠ button at the upper right hand corner of <u>the dialog box</u>.

    Note: Clicking ⊠ on the uppermost right-hand corner of the monitor will close the entire database!).

iv. Downloading Search Results Into EndNote

- Choose references for download:

    - Selecting multiple adjacent references: Click on the *first* entry for download. Go to the *last* entry desired and use SHIFT+Left Click. All entries between the first and last are selected.
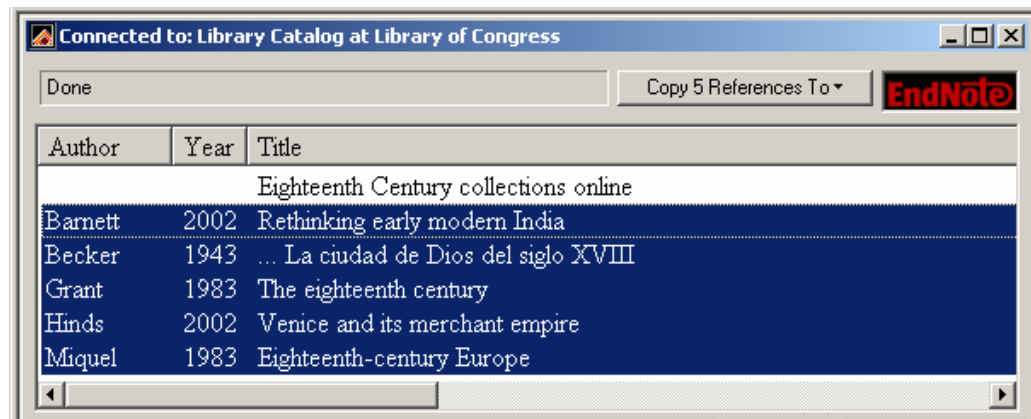
- ◆ Selecting multiple non-adjacent references: Click on the *first* entry for download. Using CTRL+Left Click, select as many references as desired. All selected entries will be highlighted.

  Note: In the example below, only 2002 references will be selected for retrieval).
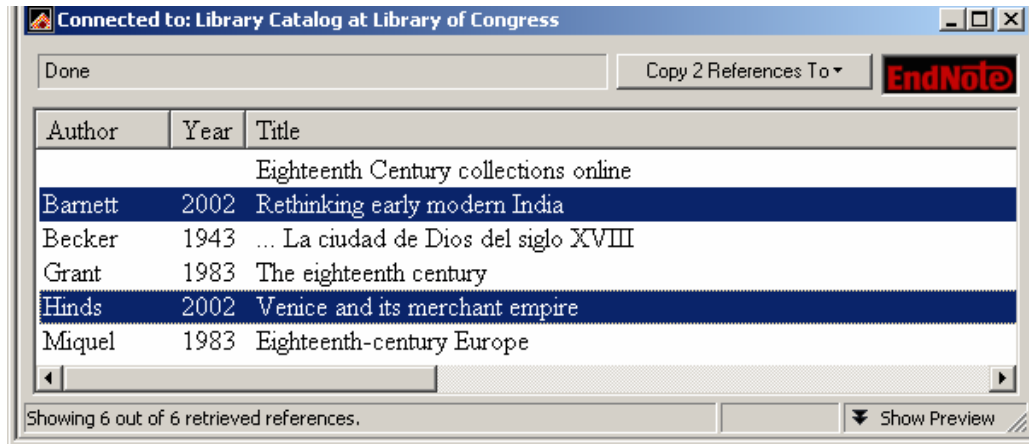
- • Click on the "Copy X References To" button (where X is the number of references selected for download). The references can either be downloaded to a New Library, an existing library or the library which is currently open. Choose the currently opened library and click once.
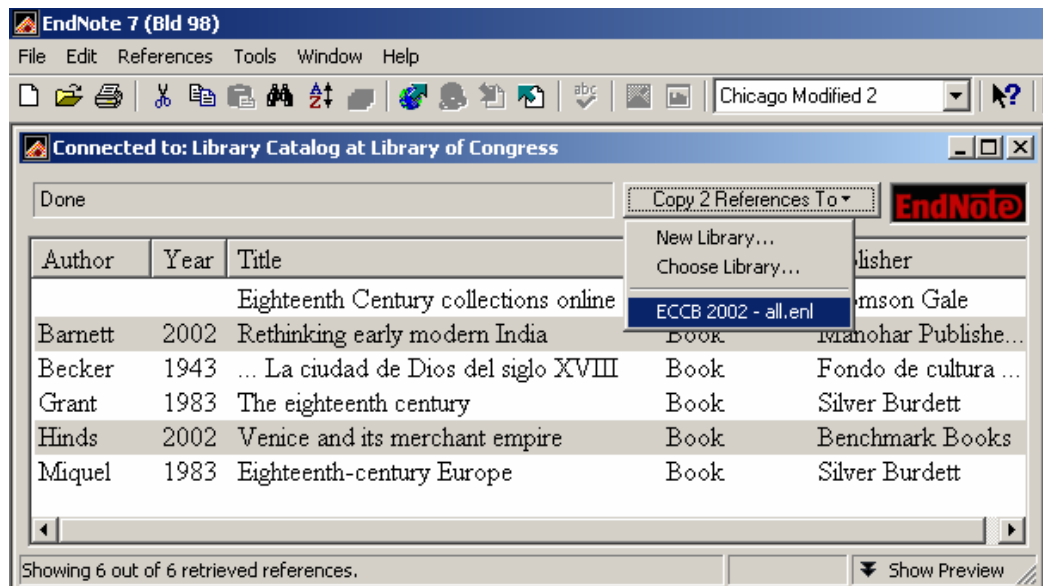
- • Downloaded references will be added to the current library file.

- • Downloaded references may be edited (for example, adding diacritical marks to foreign language entries, adding or deleting information) and formatted according to ECCB guidelines.

f. Running a Search Using Other Databases Outside of EndNote (such as America: History and Life (AHL) or Historical Abstracts (HA), etc.):

i. Searching in AHL and HA

- Connect to the database.

    Note: In the following example, AHL will be used.

- Click on ADVANCED SEARCH. Enter the search parameters.

    Note: The search engines are the same for both AHL and HA. Some overlap may occur when retrieving citations from the two databases, but for the most part searches will yield different results. AHL only searches North American catalogs, whereas HA searches international catalogs.

- To maximize search capabilities, use wildcards with keywords. For example, religio* will search for the terms "religion(s)", "religious", "religiosity", "religiousness" and any other variation thereof.

    Note: By clicking on the 🔍 button next to certain fields, multiple search terms can be entered or selected. Fields without an accompanying magnifying glass denotes that those fields can only have one search term.
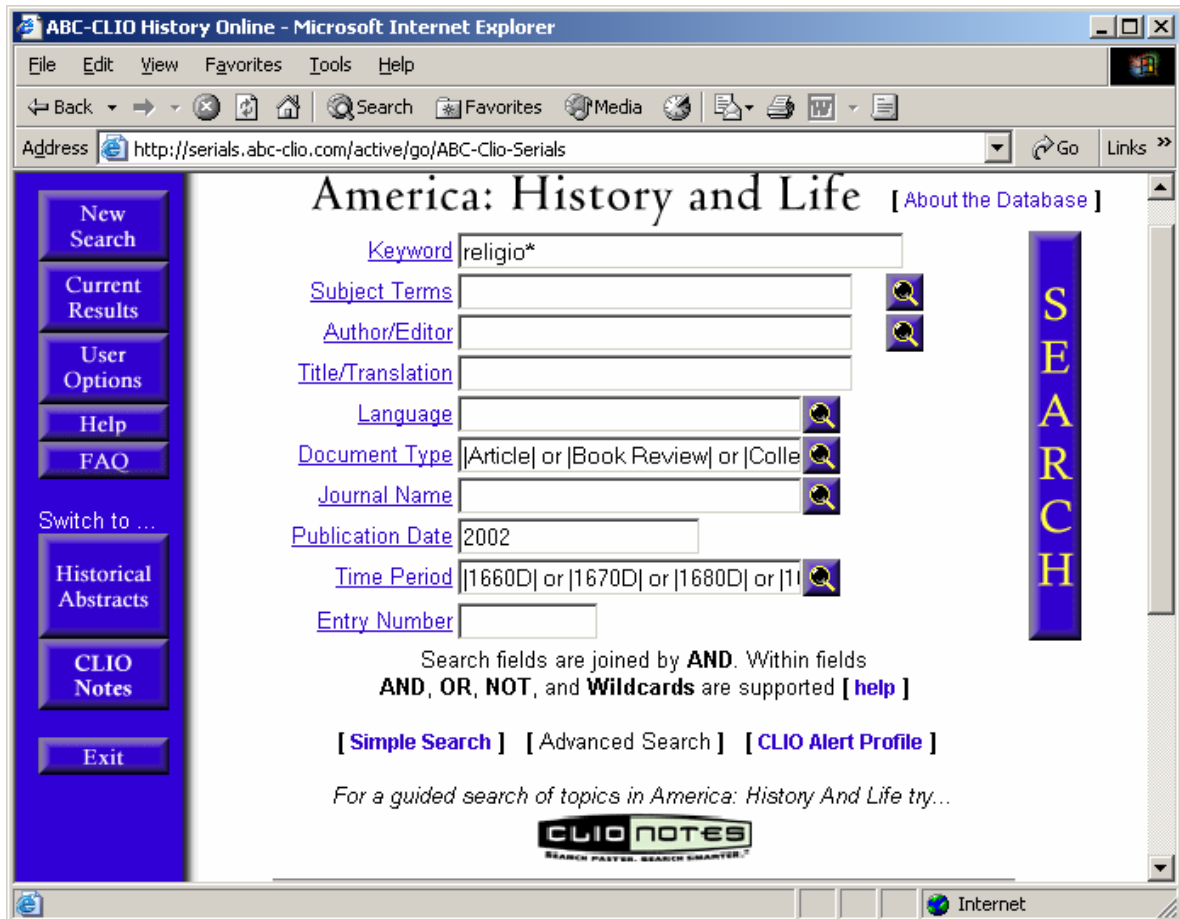
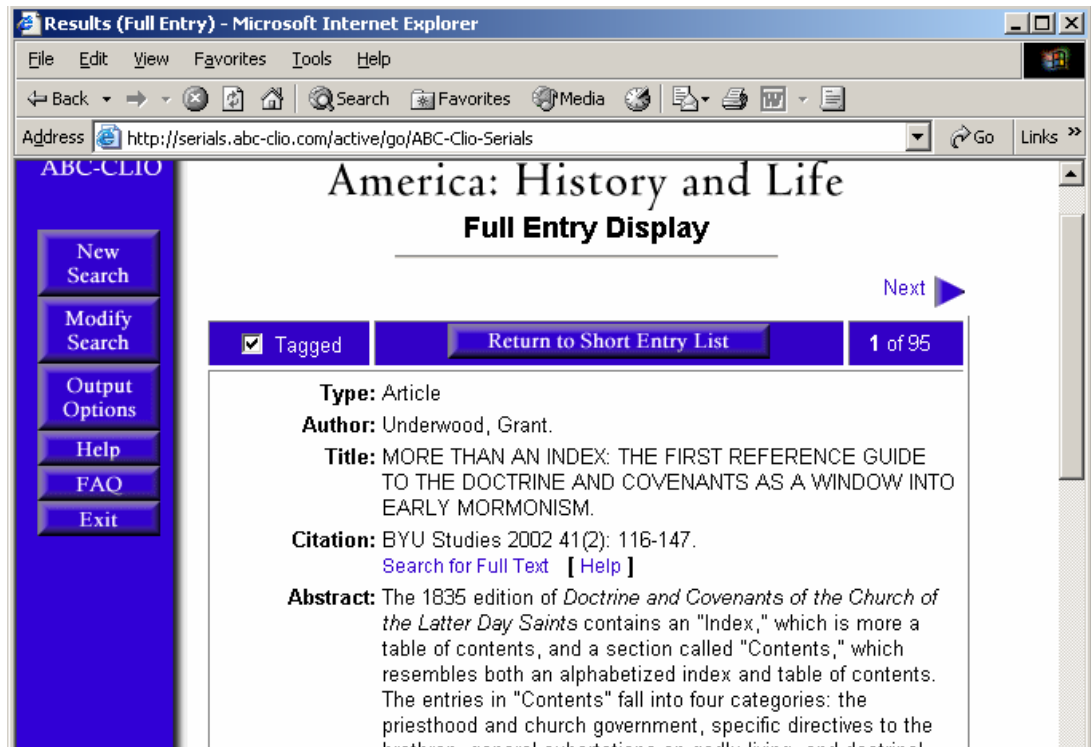- When all search terms have been entered, click on the SEARCH button to begin searching. Search results will appear, along with the number of citation hits.
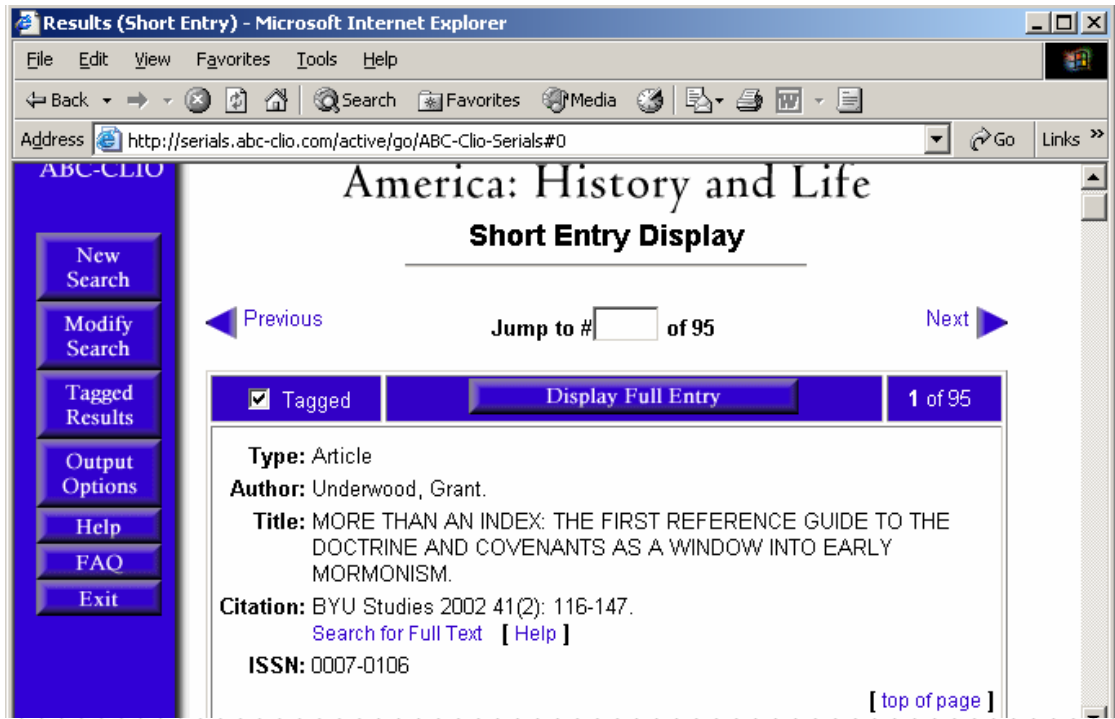

ii. Reviewing Search Entries

- The default view for all search result entries is the "Short Entry Display" mode. To see more reference details, click on the blue "Display Full Entry" button.

- Tag all desired articles by clicking on the "☐ Tagged" section in the blue header. Tagged entries will be marked with a ☑ and will be saved.

- To review all Tagged entries, click on the TAGGED RESULTS button in the left-hand menu bar.

  Note: The "Tagged Results" button will only appear in the menu bar when in "Short Entry Display" mode. To switch back to "Short Entry Display" mode, click on the "Return to Short Entry List" button on the header bar.

- When all desired references have been tagged, click on OUTPUT OPTIONS.
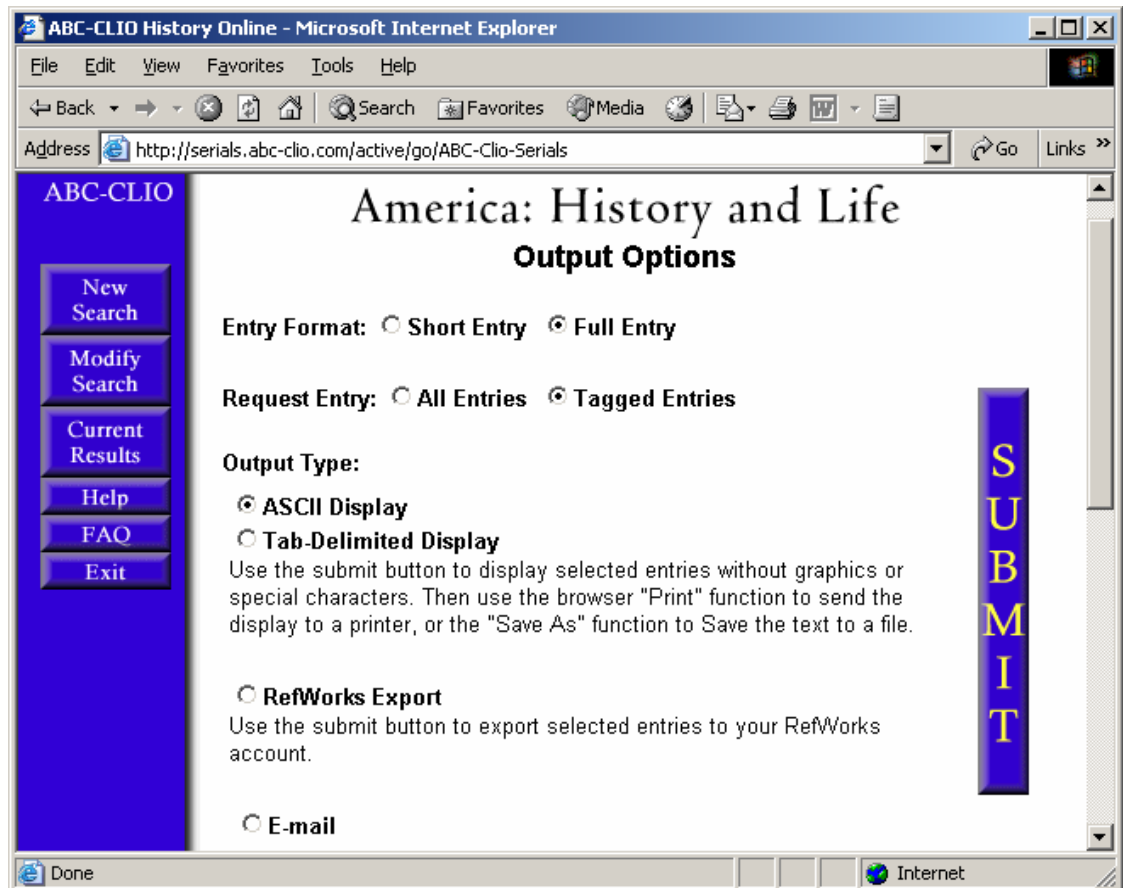
- A new window will appear. Make sure the following are selected:
      under ENTRY FORMAT: "⊙ Full Entry"
      under REQUEST ENTRY: "⊙ Tagged Entries"

  Note: Selecting "Short Entry" from ENTRY FORMAT will only list basic details such as author name(s), title and citation. Choosing "All Entries" under REQUEST ENTRY will select all tagged and untagged entries.
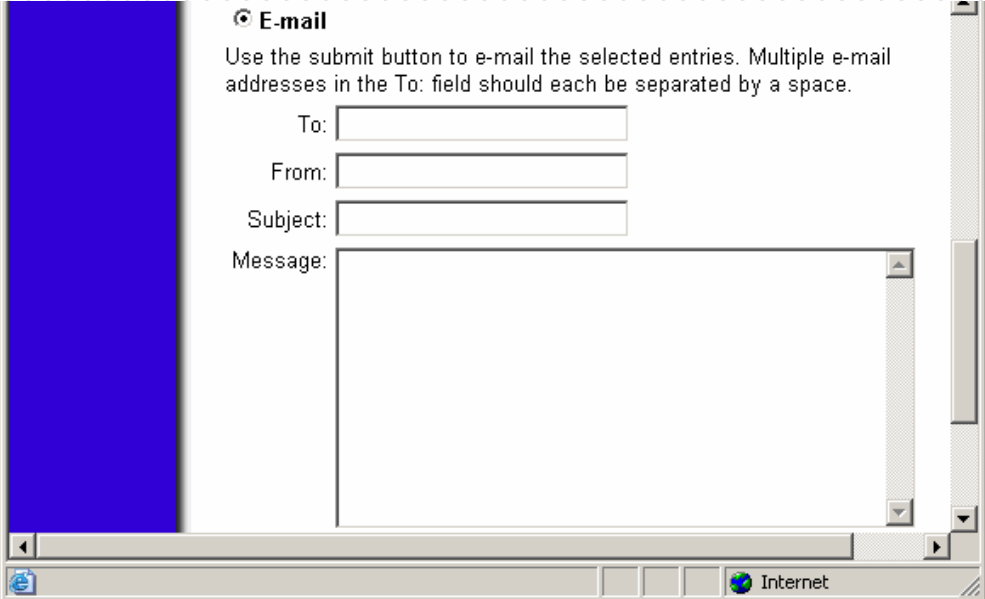
  Why would you want to choose "Full Entry"? While other information may be irrelevant, it is sometimes useful to have a copy of the abstract to ensure that the reference is relevant to your subject matter. In addition, English translations of foreign language reference titles are available. Foreign language references have abstracts in English.

iii. Choosing an OUTPUT TYPE

- E-Mail

  - Click on "E-mail".

    Note: Choosing "E-mail" will retain certain diacritical marks, which can be helpful during the editing process. However, a disadvantage to e-mailing the tagged references means manual entering of data in EndNote (either by copying and pasting values into individual fields, or entering the data by hand). Depending on the number of references tagged, this could be a long and laborious task.

  - Enter your e-mail address in the "To:" field.

    Note: To enter multiple addresses, leave a space between each address. For example: johndoe@myemail.com janedoe@eworks.com

  - Optional: Enter your e-mail address in the "From:" field.

  - Enter a subject in the "Subject:" field.

    Note: Entering subjects will help you sort through multiple search e-mails. For example: entering "religio* 2002 search" in the subject field will distinguish it from another e-mail titled "church* 2002 search".

  - Optional: Enter a message.

  - Click on SUBMIT. The tagged references will be e-mailed to all addresses in the "To:" field.

- Using ABC-Clio

  - If using a text filter such as ABC-Clio, choose "Tab-Delimited Display".

  - Click on SUBMIT. Another window opens up with all the tagged references.

Note: Diacritical marks will *not* be saved in this mode.

- Click on FILE ⇨ SAVE AS. Another dialog box appears.
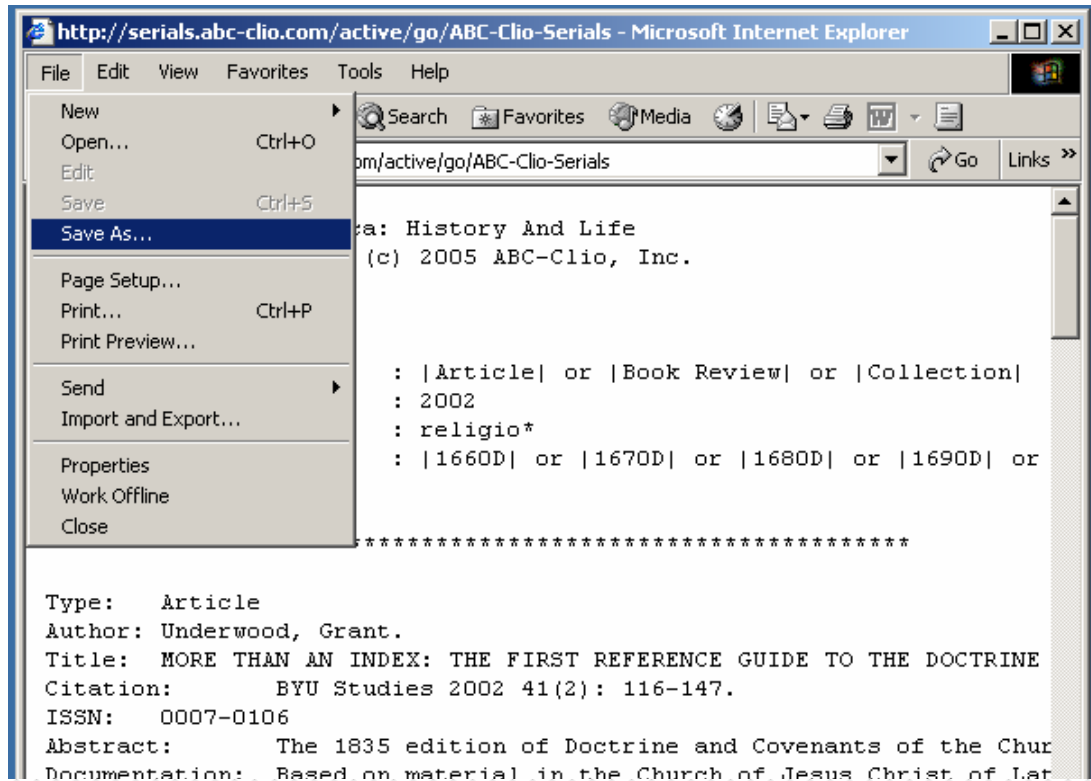
- Change the SAVE IN folder as necessary. Enter a filename.
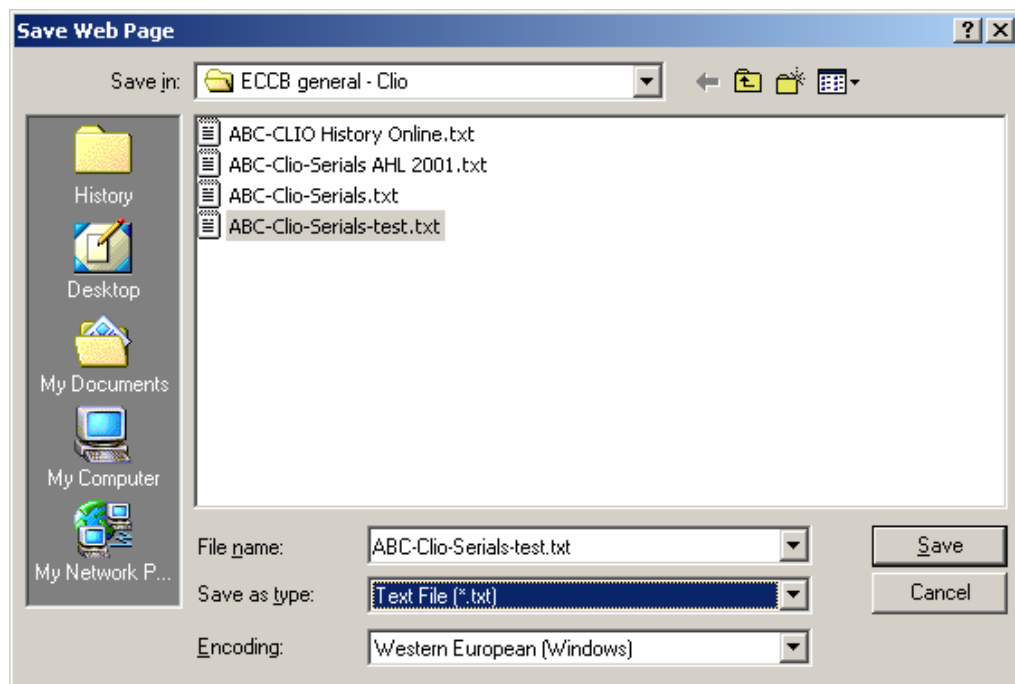
- ◆ Under SAVE AS TYPE, change the file type to "Text File (*.txt).
- ◆ Under ENCODING, choose "Western European (Windows)".
- ◆ Click on SAVE or hit ENTER. An ABC-Clio text file will be generated with all the tagged citations.

  Note: If an ABC-Clio text file already exists, you can either rename the new file by clicking on NO then entering a new filename; or you can overwrite the current file by clicking YES.

- Returning to the Search Screen
  - ◆ Click on BACK to return to AHL.
  - ◆ To go back to the Search screen, click on either NEW SEARCH or MODIFY SEARCH.

    Note: Clicking on MODIFY SEARCH will allow you to keep the current search parameters. This can be helpful when retaining the same information under "Document Types", "Publication Dates" and "Time Periods" since only the "Keywords" have to be changed.

  - ◆ To use these same parameters in HA, click on SWITCH TO "Historical Abstracts" and click on SEARCH.

g. **Importing ABC-Clio Data Into EndNote**

   i. ABC-Clio Filter Check
   - Ensure that you have the ABC-Clio filter installed (ABC-Clio.enf). If you do not know whether it is installed, perform the following:
     - ◆ Start EndNote. Go to EDIT ⇨ IMPORT FILTERS ⇨ Open Filter Manager.
     - ◆ Check to see if ABC-Clio is listed in the filter list. (Filters are listed in alphabetical order so ABC-Clio would be at the top of the list.)
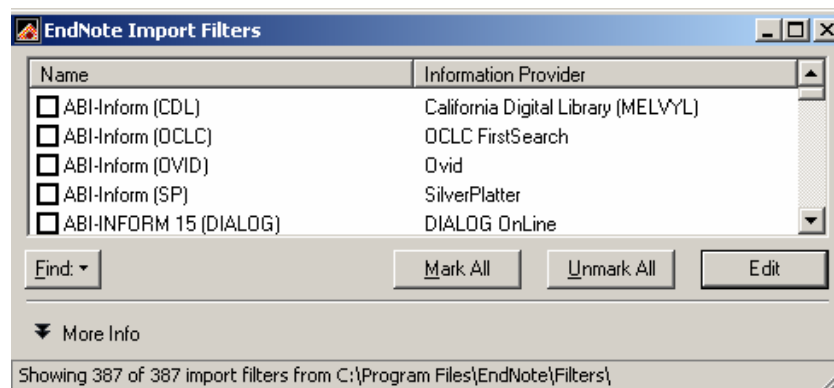
   - If ABC-Clio is listed, ensure that the checkbox is selected by clicking on the checkbox: ☑ ABC-CLIO. Go to section iii.
   - If ABC-Clio is not on the list, proceed to next section.

   ii. Installing the ABC-Clio Filter

- Obtain a copy of ABC-Clio.enf.

- Transfer or save the file to your desktop (or your personal folder, if you'd like, either by dragging-and-dropping or using the Cut (CTRL+C) and Paste (CTRL+V) functions.

 ◆ On your desktop, click on MY COMPUTER. Double-click on "(C:) Local Disk".
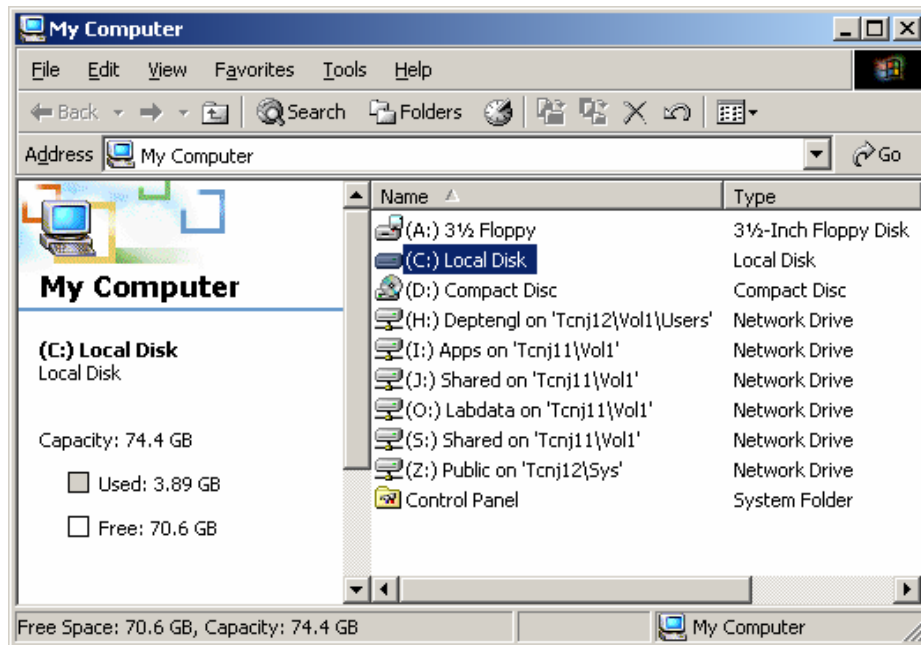
  ◆ Double-click on "Program Files" (you may need to click on "Show Files" as necessary).

  ◆ Scroll down as needed. Double-click on EndNote.

  ◆ In the EndNote folder, double-click on "Filters".

  ◆ Copy the ABC-Clio.enf file from your desktop (or other folder) to the "Filters" folder either using "drag-and-drop" or Cut (CTRL+C) and Paste (CTRL+V).

  ◆ Close the Filters folder by clicking on ⊠ on the upper right-hand corner of the window.

    Note: For EndNote to recognize the new filter, you must restart EndNote once the filter is installed.

iii. Importing ABC-Clio Data into EndNote

- Start EndNote. Open your library. Click on FILE ⇨ IMPORT.

- Click on CHOOSE FILE then select the ABC-Clio text file you had saved earlier. Change the LOOK IN folder as necessary.
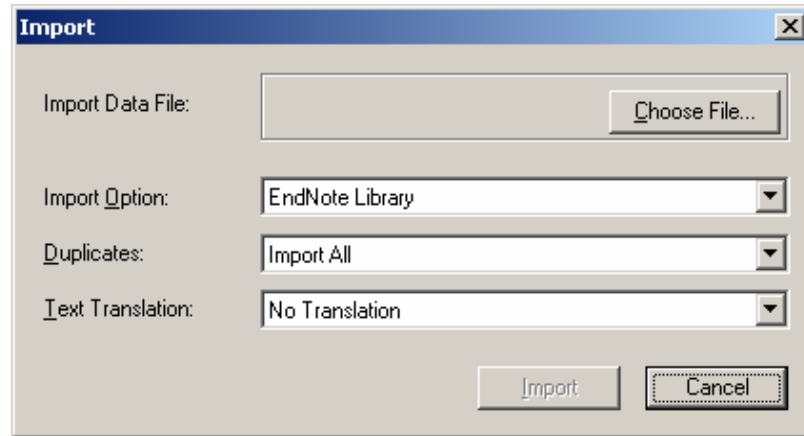
- Under IMPORT OPTION choose "ABC-Clio".

- Under DUPLICATES choose "Discard Duplicates".

- Under TEXT TRANSLATION choose "No Translation".
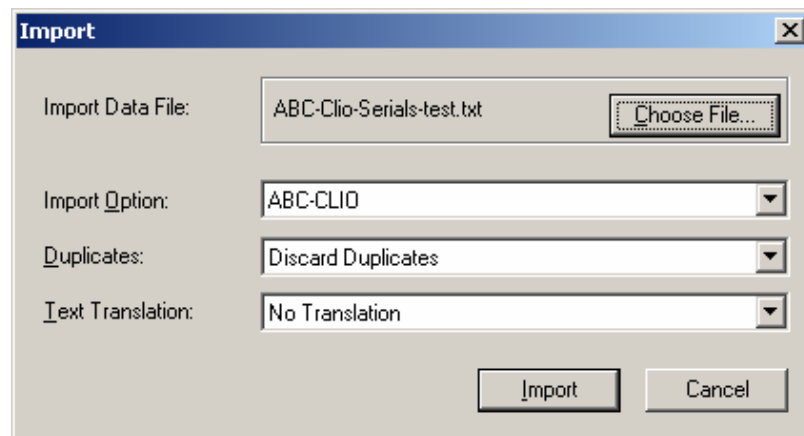
- Click on IMPORT. All tagged references will be imported into your library file.

h. **Changing Styles in EndNote**

- We are using a modified Chicago format in ECCB.

- To preview the style, click on TOOLS ⇨ SHOW PREVIEW.

- Alternatively, click on the double down arrows on the lower right hand corner of the EndNote window, labeled "Show Preview".
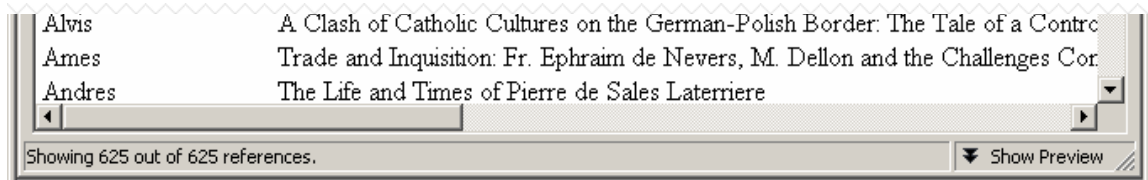
- On the main toolbar, click on the pull-down menu labeled "Select Another Style…" by clicking on the down arrow key.

- Scroll down the list of styles and choose "Chicago Modified".

- Click once. The preview should show citations in a modified Chicago format.
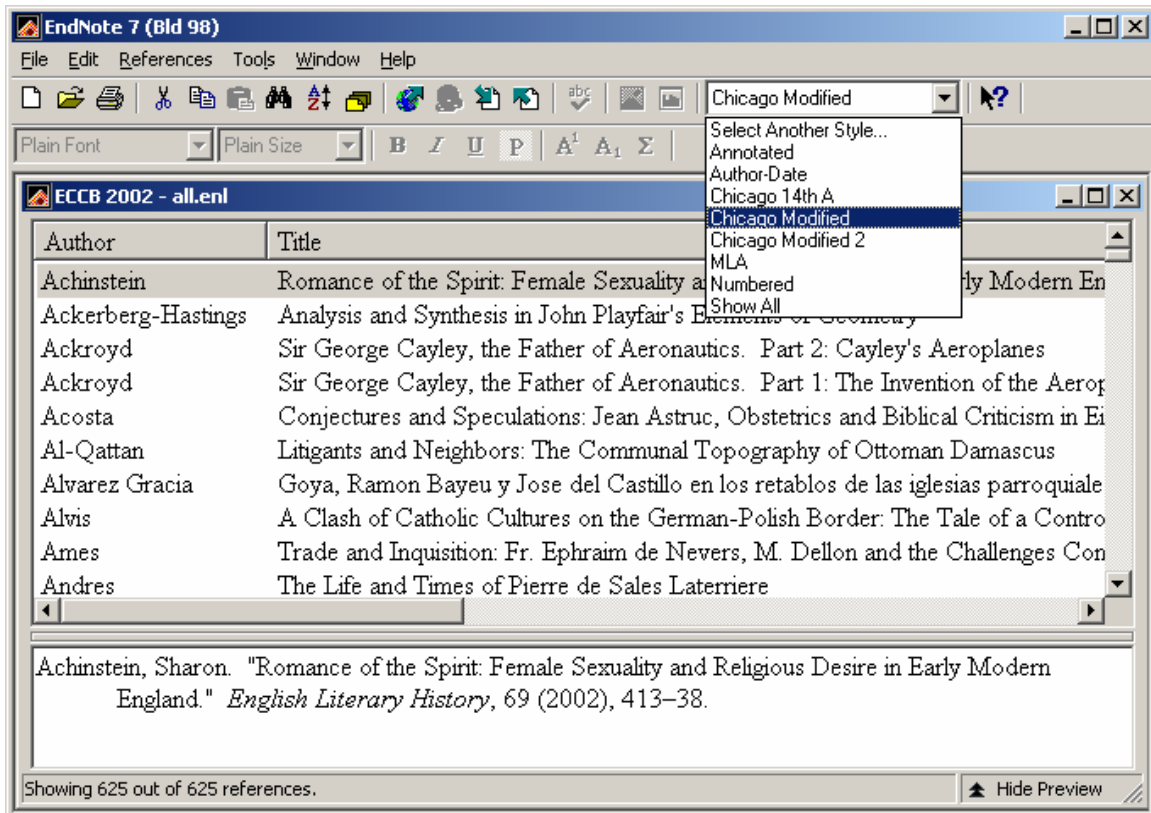
i. Sorting Entries in EndNote

- Click on the desired field in the gray header bar (Author, Year, Title, Ref Type, etc.) to sort entries in ascending order.

◆ To sort in descending order, click on the field header again (or double-click).

> Note: As an example, clicking on the AUTHOR field once will sort author names from A-Z. Clicking again will sort entries from Z-A.
>
> Similarly, clicking on the REF TYPE field once will sort all entries in ascending alphabetical order, so if you have thre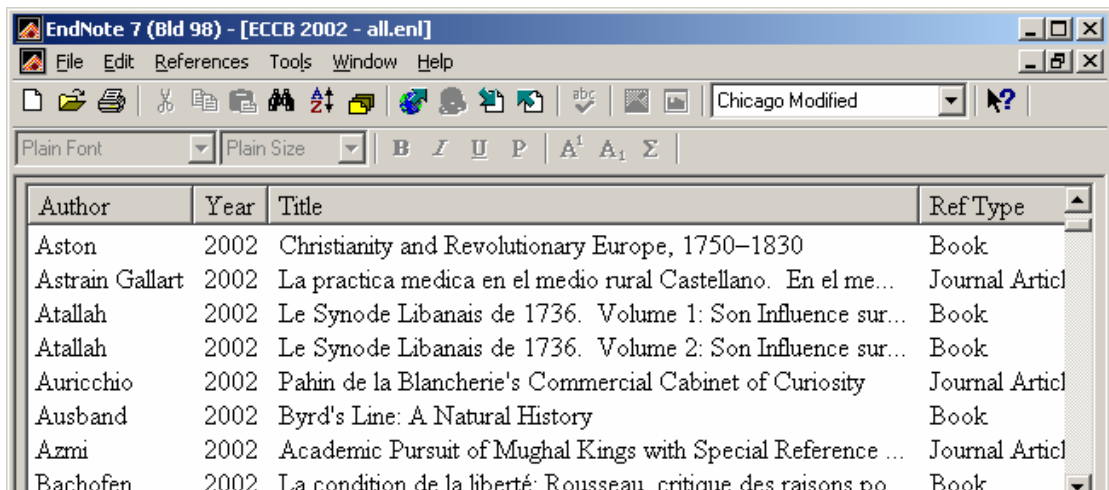e different reference types such as books, journal articles and electronic citations, EndNote will sort all book entries first, followed by electronic citations then all journal articles (Book → Electronic Citations → Journal Articles). Clicking on REF TYPE again will display journal articles first.

◆ When sorting in EndNote, be aware that it uses a nested sorting model.

> Note: As a default, entries are sorted by Author, in alphabetical order. When field sort orders are changed, sorting will display entries sorted by that particular field *first* then will sort each entry in alphabetical order by Author. See example below.

Author	Year	Title	Ref Typ
Assaf	2002	A Regal Way: The Life and Times of Rabbi Israel of Ruzhin	Book
Aston	2002	Christianity and Revolutionary Europe, 1750–1830	Book
Atallah	2002	Le Synode Libanais de 1736. Volume 1: Son Influence sur la R...	Book
Atallah	2002	Le Synode Libanais de 1736. Volume 2: Son Influence sur la R...	Book
Ausband	2002	Byrd's Line: A Natural History	Book
Bachofen	2002	La condition de la liberté: Rousseau, critique des raisons politiques	Book
Baker	2002	Absolutism and the Scientific Revolution, 1600–1720: A Biogra...	Book
Barnett	2002	Rethinking Early Modern India	Book

> In the example above, clicking on REF TYPE will sort entries by reference type. All books will be listed in alphabetical order by author, followed by electronic citations then journal article entries, and so on.

j. Changing Display Fields

- Sometimes, you may want to sort or display fields which are not on screen. To do this, you must first display the fields you want.

- To change the displayed fields, click on EDIT ⇨ PREFERENCES.

- Another dialog box will open. Click on DISPLAY FIELDS.

- Using the pull-down menu to the right of each field name, choose the desired field. Up to five fields may be used at any given time.

- Change other fields as necessary. Click on OK or hit ENTER when finished.
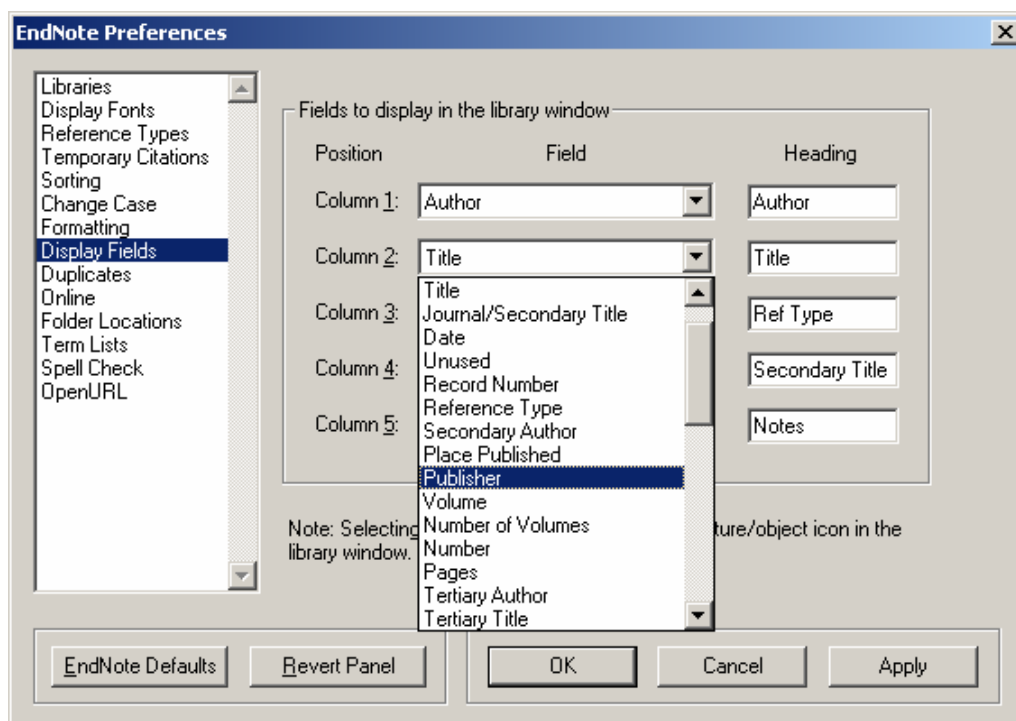
- To sort items, follow the instructions in Section 1.i, Sorting Entries in EndNote.

k. Exporting Entries for Use in WordPerfect

   i. Transferring all entries

- Sort entries accordingly. Generally, this will be in ascending order by Author.
- Click on FILE ⇨ EXPORT.
- Change the SAVE IN folder as necessary. Enter a filename.
- Under SAVE AS TYPE, choose "Rich Text Format (*.rtf)" then click on SAVE.
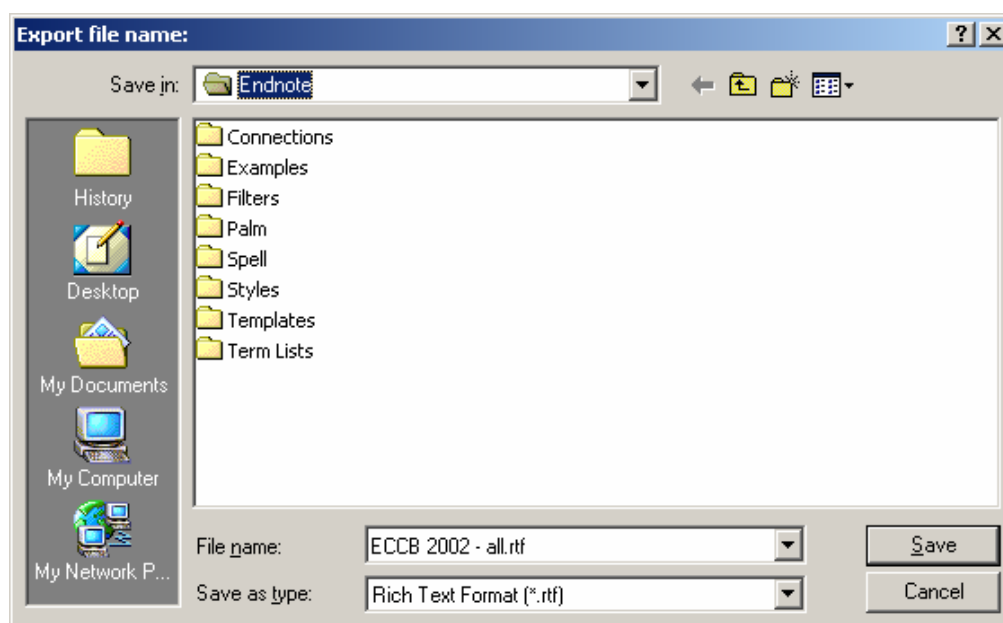
ii. Transferring specific entries

- Click on REFERENCES ⇨ SEARCH REFERENCES. Alternatively, hit CTRL+F.

- Another dialog box opens. In the first pull-down menu section, choose the desired field. (In this example, "Reference Type" is chosen.)

- Enter the keyword. (Ex: "Book" is entered.) Click on SEARCH or hit ENTER.
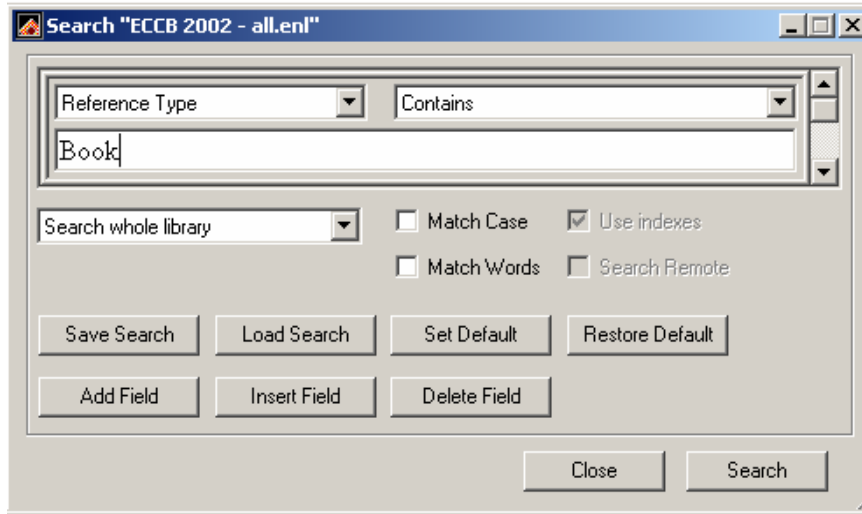
- Only book entries will be displayed in the main EndNote window. The number of book entries (versus the total number of references) will be displayed on the bottom left-hand corner of the screen.

- Click on FILE ⇨ EXPORT.

- Change the SAVE IN folder as necessary. Enter a filename.

- Under SAVE AS TYPE, choose "Rich Text Format (*.rtf)" then click on SAVE.

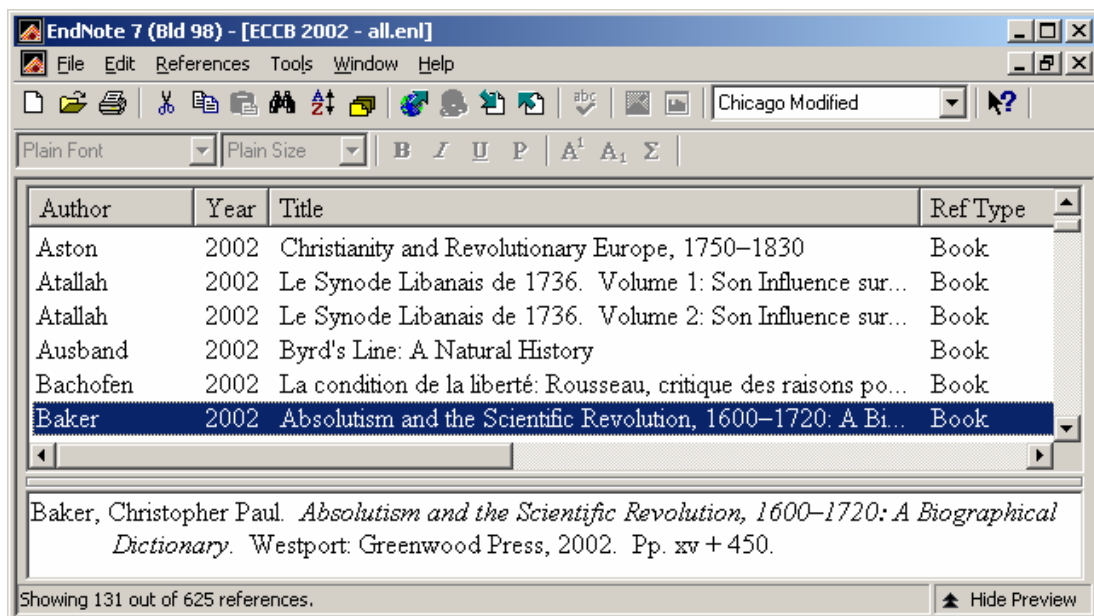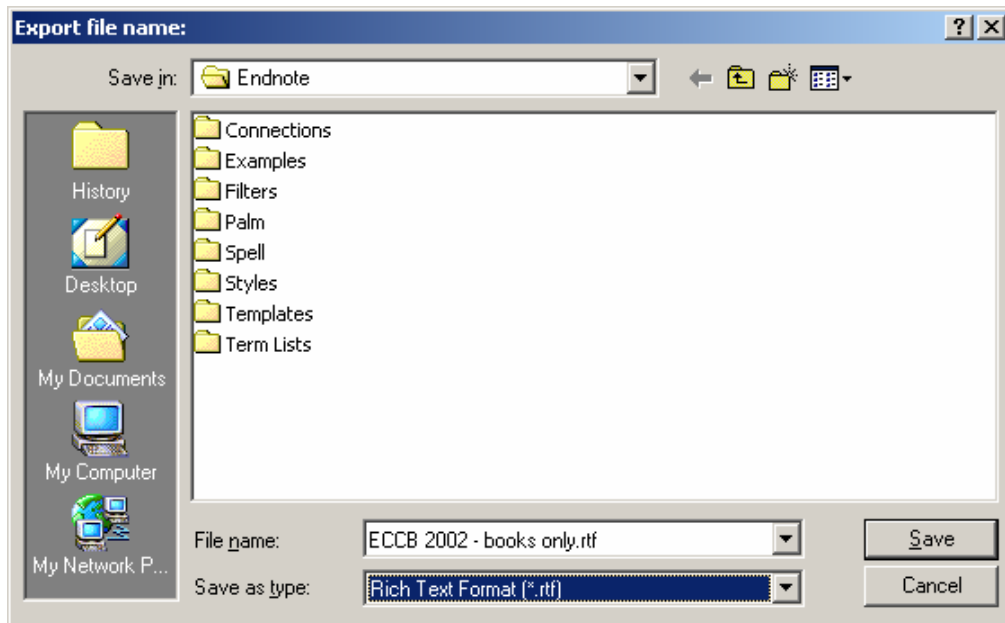- To show all entries again, click on REFERENCES ⇨ SHOW ALL REFERENCES. Alternatively, hit CTRL+M.

2. **To open and format the file in WordPerfect, do the following:**

   a. **Starting WordPerfect**

   - Double-click on the WordPerfect icon on your desktop: **Error! Objects cannot be created from editing field codes.**

   - If you do not have a shortcut on your desktop, go to START ⇨ PROGRAMS ⇨ "WordPerfect Office 11" then "WordPerfect".

   b. **Importing Entries Into WordPerfect**

   - Using My Computer or Windows Explorer, go to the folder where the saved rtf file is located. The rtf file is the file you exported in Section 1.k above.

     Note: My Computer can be accessed from the Desktop.

     To access Windows Explorer, go to START ⇨ PROGRAMS ⇨ Explorer.

   - Right click on the file, then click on OPEN WITH. Choose WordPerfect 11.

     Note: The default file association for an rtf (rich-text format) file is Microsoft Word. Double-clicking on the file or clicking on OPEN will open the file in Microsoft Word.

     All ECCB files should be opened and formatted in WordPerfect.
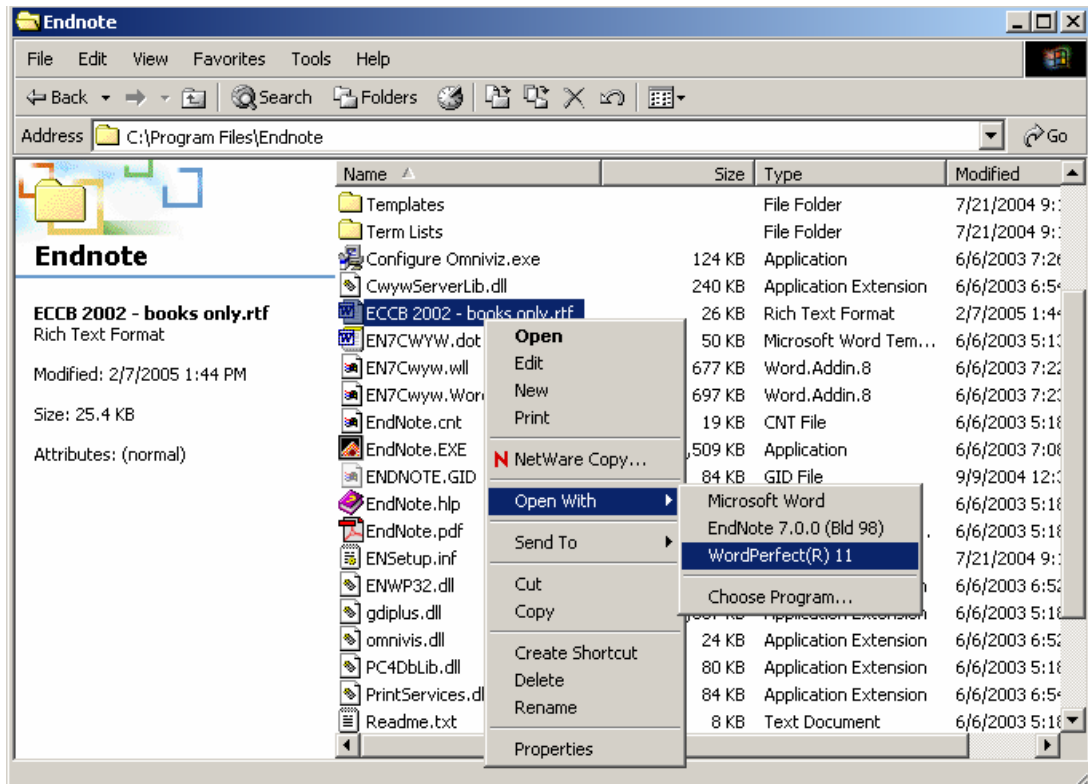
- The file will open in WordPerfect.

c. Saving Exported Entries (*.rtf) in WordPerfect (*.wpd) format

- Go to FILE ⇨ SAVE AS. Alternatively, hit F3. Another window will open.

  Note: Clicking on FILE ⇨ SAVE or hitting CTRL+S will retain the current document's rtf format.

- Change the SAVE IN folder as necessary. Enter a filename.

- Under FILE TYPE, choose "WordPerfect 6/7/8/9/10/11" format. Click on SAVE or hit ENTER.

d. Formatting Documents According to ECCB Guidelines

- Click on VIEW ⇨ REVEAL CODES. Alternatively, hit ALT+F3. A window will appear on the lower half of the document.

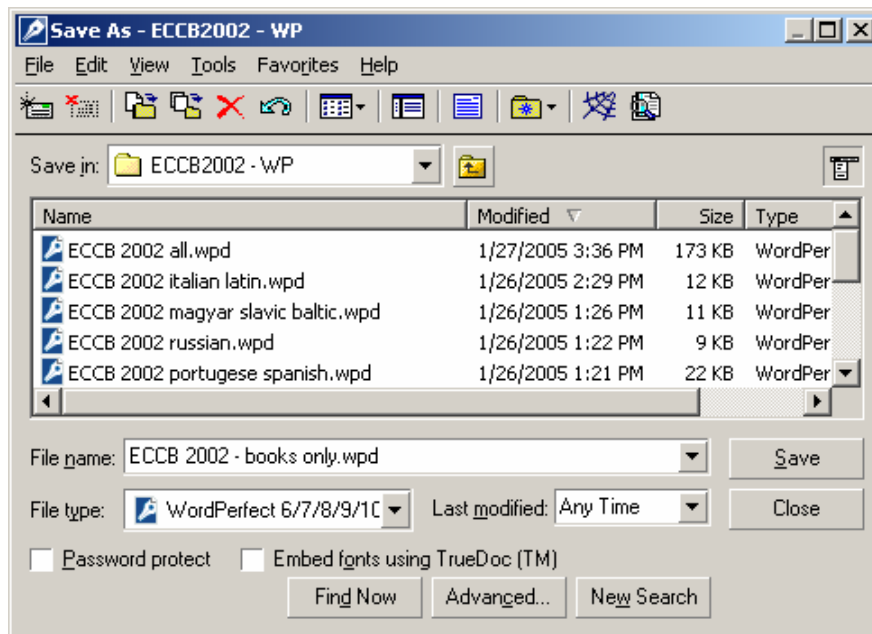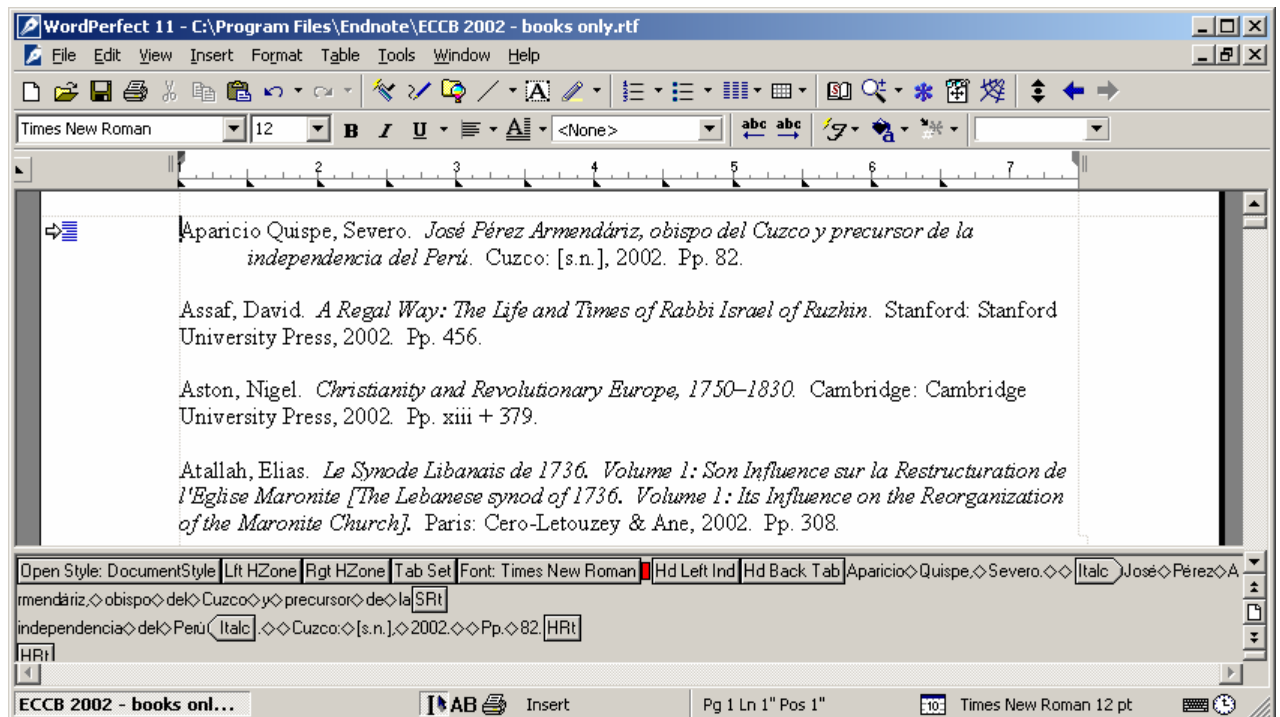 ◆ Go to the beginning of the line for the first entry. Click on FORMAT ⇨ PARAGRAPH ⇨ "Hanging Indent" to add a hanging indent to the entry. Alternatively, hit CTRL+F7.

  Note: A "hanging indent" will indent all but the first line in the entry.

  ◆ Remove all extraneous codes from the line, such as "Lft HZone", "Rgt HZone", "Tab Set" and "Font". Use the red block as a guide.

  Note: The red block indicates the cursor position. Extra codes can be deleted using either the BACKSPACE or DELETE keys.

  In the example above, the red block is between "Font" and "Hd Left Ind". Hitting BACKSPACE will delete codes to the left of the red block; in this case, "Font" will be deleted. Hitting DELETE will remove all codes to the right of the red block, and in this case, "Hd Left Ind" will be deleted.

  ◆ Only "Hd Left Ind" and "Hd Back Tab" should be visible at the head of each line.

  Note: Only the very first line of the first entry of the document should have the "Open Style" code. This code cannot be deleted. See example below.

WordPerfect 11 - C:\Program Files\Endnote\ECCB 2002 - books only.rtf

File   Edit   View   Insert   Format   Table   Tools   Window   Help

Times New Roman   12   B I U ▾ ≡ ▾ A ▾ <None>

Aparicio Quispe, Severo. *José Pérez Armendáriz, obispo del Cuzco y precursor de la independencia del Perú.* Cuzco: [s.n.], 2002. Pp. 82.

Assaf, David. *A Regal Way: The Life and Times of Rabbi Israel of Ruzhin.* Stanford: Stanford University Press, 2002. Pp. 456.

Aston, Nigel. *Christianity and Revolutionary Europe, 1750–1830.* Cambridge: Cambridge University Press, 2002. Pp. xiii + 379.

Atallah, Elias. *Le Synode Libanais de 1736. Volume 1: Son Influence sur la Restructuration de l'Eglise Maronite [The Lebanese synod of 1736. Volume 1: Its Influence on the Reorganization of the Maronite Church].* Paris: Cero-Letouzey & Ane, 2002. Pp. 308.

Open Style: DocumentStyle | Hd Left Ind | Hd Back Tab | Aparicio◇Quispe,◇Severo.◇◇ Italc José◇Pérez◇Armendáriz,◇obispo◇del◇Cuzco◇y◇precursor◇de◇la SR

independencia◇del◇Perú Italc .◇◇Cuzco:◇[s.n.],◇2002.◇◇Pp.◇82. HRt

HRt

ECCB 2002 - books onl...   AB   Insert   Pg 1 Ln 1" Pos 1"   Times New Roman Regular 12

- Add a hanging indent to the head of each entry.
- Save the document often.