

## EndNote Exercise 1: Getting Started—References for Business

In this exercise, you'll learn how to do the following tasks:

- Create a new library and add references manually.
- Set the Preview to display references in the format required by *The American Psychological Association* (5<sup>th</sup> ed.).
- Edit references to display properly in this style.

### Create a Library

The “library” is the basic framework in EndNote. The library contains information about the sources you use in your research, such as author(s), article title, journal title, page numbers, etc. It is best to create and maintain one library for each major research project, such as your dissertation. To create a new library, follow these steps:

1. To open EndNote, click on *Start* then select *Programs/EndNote/EndNote Program*.
2. Select *Create a new EndNote Library* and click *OK*.
3. The New Reference Library dialog box opens. In the *File Name:* box, enter *mylibrary*. Make sure the *Save as Type* box displays *EndNote Library (\*.enl)*. Note the folder where your library will be saved. Click *Save*. If you see a popup box that states *mylibrary.enl* already exists and asks if you want to replace it, click *Yes*.
4. The *mylibrary.enl* window is now open and you're ready to start entering references.

### Manually Entering References

One way to enter references into your library is to type them manually, one reference at a time. This is a common method for sources that you discover from a list of references at the end of an article, for example.

To save time in completing these exercises, lists of keywords and abstracts are available at <http://www.gwu.edu/gelman/guides/endnote/business/samplesbus.htm>. Open Internet Explorer and keep it open in a separate window. You can then copy a list of keywords or an abstract from the web page paste it into the appropriate field of your EndNote library. If you prefer, you can manually type keywords and abstracts rather than copying and pasting.

Follow these steps to enter a reference:

1. From the menu bar at the top of the page, select *References/New Reference*. You'll see a new window.

2. At the very top of the window, in the pull down menu for *Reference Type*, select *Journal Article*.

3. Click in the *Author* field so that you see the cursor and enter this name:

Cropanzano, Russell

You could also enter this name in the form Russell Cropanzano (without a period). After you type this author's name, press *Enter*.

4. Now enter the second author's name:

Mitchell, Marie S.

The period after initials is optional, but always leave a space or type a period between initials. Press *Tab* to move to the next field.

5. In the *Year* field, enter 2005. Always enter 4 digits for the publication year. Press *Tab* to move to the Title field.

6. In the *Title* field, enter the title of the article: Social exchange theory: An interdisciplinary review. Do NOT include a period after the last word in the title.

7. In the *Journal* field, enter Journal of Management. Always enter the full title of the journal, not an abbreviation. Again, do not enter a period at the end of the title.

Notice that words in the Author and Journal fields appear in red. This indicates that as you begin to enter a name or journal title you have used before, EndNote will automatically complete the term for you. The same is true for the *Keywords* field, which we'll use in Step 13. Later in this exercise we'll explore **Term Lists**, which is the basis for EndNote's "auto complete" feature.

8. In the *Volume* field, enter 31.

9. In the *Issue* field, enter 6.

10. In the *Pages* field, enter 874-900.

11. In the *Date* field, enter December.

12. Press *Tab* until you reach the *Keywords* field. Keywords are terms or phrases that represent major topics covered in the article. Keywords are sometimes given as part of the database citation, or you can enter your own keywords to help remind you of the focus of the article. Also, keywords can remind you of what search terms you used to find this document.

13. Enter these terms in *Keywords* field (or cut and paste them from the list at <http://www.gwu.edu/gelman/guides/endnote/business/samplesbus.htm>). Press *Enter* after each term:

Studies  
Theory  
Organizational behavior  
Professional relationships

14. In the *Abstracts* field, enter (or copy/paste) the following text:

Social exchange theory (SET) is one the most influential conceptual paradigms in organizational behavior. Despite its usefulness, theoretical ambiguities within SET remain. As a consequence, tests of the model, as well as its applications, tend to rely on an incompletely specified set of ideas. The authors address conceptual difficulties and highlight areas in need of additional research. In so doing, they pay special attention to four issues: (a) the roots of the conceptual ambiguities, (b) norms and rules of exchange, (c) nature of the resources being exchanged, and (d) social exchange relationships.

15. When you enter a reference, it is saved automatically to your library. It is not necessary to “save” it. Likewise, it is a good idea to keep duplicate copies of your library (*File—Save a Copy...*), because if you accidentally delete references, those changes are saved automatically as well!
16. Close the *New Reference* window by selecting *File/Close Reference*, or click on the “x” at the top right of the reference window.

You should now see the reference in the “mylibrary.enl” window. If *Show Preview* is visible in the lower right of the mylibrary window, click on it. This will display the reference in the selected output style. Now Let’s set the style to APA 5th.

### To Change Output Styles

EndNote uses the term *output style* to refer to various citation styles. To change the output style, follow these steps:

1. From the EndNote menu bar, select *Edit—Output Styles--Open Style Manager*.
2. Scroll through the list of styles until you see *APA 5th*.

**Note:** EndNote contains many different citation styles. In the Style Manager you can browse the list to see if the specific style you use is available. Clicking the *Category* bar at the top of the list will sort the styles alphabetically by discipline—EndNote lists several under the heading “Business.” Most refer to the citation styles preferred by certain journals in the field.

3. Click in the checkbox next to APA 5th so that you see a checkmark. If there is already a checkmark next to it, just leave it as is. Close the EndNote Styles window.
4. This will bring you back to your “mylibrary” window. On the EndNote menu bar, select *Edit/Output Styles*. You should now see APA 5th in the list. Select this and your reference preview will be reformatted in that style.

### **Enter Additional References**

For practice, create a new reference for the following journal article. Refer to steps 1-16 in the “Enter References” section of this handout (pp. 1-3).

Ricky W. Griffin, Yvette P. Lopez. 2005. "Bad behavior" in organizations: A review and typology for future research. *Journal of Management* 31, no. 6: 988-1005

Keywords:

Studies  
Organizational behavior  
Employee problems

Abstract:

In recent years, organizational scholars have increasingly focused on various forms of bad behavior in the workplace. Notable examples of these behaviors include deviance, aggression, antisocial behavior, and violence. Unfortunately, as this body of work has grown, so too has a proliferation of concepts, constructs, and definitions. This article reviews the literature regarding the general set of concepts and constructs relating to bad behavior in organizations. The authors identify both areas of uniqueness as well as areas of overlap among these various concepts and constructs. They also propose a typology to guide future theory development and empirical research.

After you entered all the information for this reference, select *File/Close Reference* or click on the X at the top right of the Reference window.

### **Term Lists**

As your library expands, it’s helpful to see a list of keywords, authors, or journal titles already entered. Go to *Tools/Open Term Lists* and select the desired list. Reviewing the keywords in particular is useful in selecting appropriate terms for an article and in keeping your keyword vocabulary under control. Words or phrases listed in the Term

Lists are those terms that EndNote will auto-complete as you enter them in the Author, Journal, or Keywords fields.

Click the *Close* button to close the Term List

### **Another Kind of Reference**

In the course of your research, you may need to enter references to more than just journal articles. EndNote provides templates for a variety of kinds of sources, including books, newspapers, magazines, government documents, reports, and theses. For now, let's take the example of a dissertation.

1. From the menu bar at the top of the page select *References/New Reference*.
1. At the very top of the new reference window, in the pull down menu for *Reference Type*, select *Thesis*. Note that some of the fields are different from the Journal Article reference.
2. In the *Author* field, enter the name McDermott, Margaret Ann
3. In the *Year* field, enter 2003.
4. In the *Title* field, enter An empirical investigation of core competence and firm performance
5. In the *University* field, enter State University of New York at Albany .
6. In the *Thesis Type* field, enter Doctoral dissertation.
7. Enter the following terms in the *Keywords* field:  
  
Core competence  
Firm performance
8. Now close the new reference window to return to your library.

### **Add a New Output Style**

The APA 5<sup>th</sup> style supplied with EndNote does not include the “retrieved” statement for articles retrieved online, as specified in the *Publication Manual of the American Psychological Association* (5<sup>th</sup> ed., p. 231): Retrieved [Month, Date Year] from the [Database name] database.

We won't cover creating Output Styles in this session, but there is a modified, downloadable APA 5<sup>th</sup> style file that will fix these problems. Follow these steps to download the file.

1. Go to <http://www.gwu.edu/gelman/guides/endnote/>
2. Click on "Output Styles."
3. Click on the *APA 5<sup>th</sup> Revised Output Style..*
4. A *File Download* box will open asking if you want to save the file. Click *Save*.
5. Within the *Save As* dialog box, select this directory: C:\Program Files\EndNote\Styles\. Be sure the *File name:* box indicates *APA 5<sup>th</sup> rev* and the *Save as type* box indicates *EndNote Style*.
6. Click *Save*.

Once the file is saved in the EndNote Styles directory, we need to apply it mylibrary. Follow these steps:

1. To apply this Output Style, on the EndNote menu bar select *Edit/Output Styles/Open Style Manager*.
2. Scroll until you see *APA 5<sup>th</sup> rev*. Click in the box so a checkmark appears next to this style.
3. Close the *EndNote Styles* window.
4. On the EndNote menu bar, select *Edit/Output Styles*, then select *APA 5<sup>th</sup> rev*.

### **Add Fields to Comply with APA 5<sup>th</sup>**

For any articles that are retrieved online, APA 5<sup>th</sup> requires that you include a "retrieved" statement in that reference. This statement needs to include the date the article was retrieved and either the URL or the name of the database from which the article was obtained. Here are two examples:

Hult, G.T., Ketchen, D.J., & Slater, S. F. (2005). Market orientation and performance: an integration of disparate approaches. *Strategic Management Journal*, 26(12), 1173-1181. Retrieved November 15, 2005, from ABI/INFORM Complete database.

Samuelson, J., & Gentile, M. (2005). Getting aggressive about passivity. *Harvard Business Review*, 83(11), 18-20. Retrieved November 15, 2005, from ABI/INFORM Complete database.

Follow these steps to add data to the fields related to online references:

1. Open mylibrary, if it is not already open.
2. Double click on the *Cropanzano 2005* reference. Alternately, you can select the reference, then select *References/Edit References*.
3. Scroll down to the *Access Date* field and enter **November 15, 2005**. Assume that this is the date on which you retrieved the article online.
4. Scroll to the *Name of Database* field. Enter **Elsevier Web Editions**. (The full text of the article is available from this database.)
5. Close the reference. In the Preview window, you should see the “retrieved” statement.

**Note:** When importing references into your EndNote Library—see Exercise 2—you will find that sometimes some of these fields will be automatically filled in. Sometimes they will not be. In order to get your references formatted correctly, you may need to edit the information in these and other fields yourself.

Congratulations! You’ve finished Exercise 1. Keep mylibrary open and move on to Exercise 2.