

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

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 APA 5<sup>th</sup> format
- Add new fields to display the date and source database for references retrieved online.
- Download a modified output style for APA 5<sup>th</sup>
- Edit references to display properly in APA 5<sup>th</sup>

### Create a Library

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

1. To open EndNote, click on *Start*. 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)*. Make a note of the folder where the file will be saved. Click *Save*.
4. The *mylibrary.enl* window is now open and you're ready to start entering references.

### Enter 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/education/sampleseduc.html> . 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*.
2. At the very top of the page in the pull down menu for Reference Type, select *Journal Article*.
3. Click in the *Author* field so you see the cursor, then enter this name: Haser , Shelly G. You could also enter this name in the form Shelly G. Haser. The period after initials is optional, but always leave a space or type a period between initials. After you type this author's name, press *Enter*.
4. Now enter the second author's name: Nasser , Ilham. Press *Tab* to move to the next field.
5. In the *Year* field, enter 2003. 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: Teacher job satisfaction in a year-round school. Do not include a period after the last word in the title.
7. In the *Journal* field, enter Educational Leadership. 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 60.
9. In the *Issue* field, enter 8.
10. In the *Pages* field, enter 67-79.
11. In the *Date* field, enter May .
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 abstract or you can enter your own keywords to help remind you of the focus of the article.
13. Enter these terms in Keywords field. Press *Enter* after each term. Remember, you can copy this list of keywords from

<http://www.gwu.edu/gelman/guides/endnote/education/sampleeduc.html> and paste it into the Keywords field.

Elementary Secondary Education  
Job Satisfaction  
Labor Turnover  
Teacher Motivation  
Work Environment  
Year Round Schools

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

Describes reasons for teacher job satisfaction at a year-round elementary school in Fairfax County, Virginia, such as flexible work schedules, reduced stress, and time for professional planning.

15. When you enter a reference, it is automatically saved to your library. It is not necessary to “save” it.

16. Close the New Reference Window by selecting *File/Close Reference*.

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. Since you’ll be working with the style outlined in the Publication Manual of the American Psychological Association, 5th edition, let’s set the Style to APA 5<sup>th</sup>.

### **To Change Output Styles**

EndNote uses the term output style to define various citation styles. Depending on the computer you’re using, the output style may or may not be set to APA 5<sup>th</sup>. 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 5<sup>th</sup>*. Click in the checkbox next to *APA 5<sup>th</sup>* so that you see a checkmark. If there is already a checkmark next to *APA 5<sup>th</sup>*, just leave it as is. Close the EndNote Styles window.
3. This will bring you back to your mylibrary window. On the EndNote menu bar, select *Edit/Output Styles*. You should now see *APA 5<sup>th</sup>* in the list. Select *APA 5<sup>th</sup>* and your reference preview will be reformatted in *APA 5<sup>th</sup>* 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)

Ferguson, Janet M. The Effect of Year-Round School on Student Achievement in Mathematics. Educational Forum. v64 n1 p82-87 Fall 1999.

Keywords:

Intermediate Grades

Mathematics Achievement

Teacher Attitudes

Time Factors

Year Round Schools

Abstract: In comparing 44 fifth- and sixth graders in year-round school with 40 on a traditional calendar, the traditional group improved math scores significantly over the summer. Despite no significant differences between the groups, year-round students seemed more consistent in achievement.

After you entered all the information for this reference, select *File/Close Reference*.

## 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

## Reports and Conference Proceedings

It is likely that you will need to add references for reports and conference papers to your library. The process is nearly identical to adding article references, but there are differences in the fields that are used. Follow these steps to add a sample report:

1. From the menu bar at the top of the page select *References/New Reference*.
2. At the very top of the page in the pull down menu for Reference Type, select *Report*.
3. In the *Author* field, enter these names:  
Paul Guyer

Jennifer Kuhn  
Buzz Breedlove

4. In the *Year* field, enter 1999.
5. In the *Title* field, enter Year-round operation in higher education.
6. In the *City* field, enter Sacramento, CA.
7. In the *Institution* field, enter Legislative Analyst's Office.
8. In the *Date* field, enter February. For reports and conference papers, APA specifies that the month, not the exact date, be included in the reference.
9. This report is available through the ERIC Document Reproduction Service, so it has an ED number. Enter this number, ED439651, in the *Accession Number* field. Be sure to use all capital letters for ED.
10. Enter the following terms in the *Keywords* field:

Community Colleges	Higher Education
Educational Demand	School Restructuring
Educational Economics	Statewide Planning
Educational Planning	Year Round Schools
Enrollment Trends	
11. In the *Abstract* field, enter the following text:

This report reviews projected enrollment growth of the three segments of higher education in California: the University of California (UC), the California State University (CSU), and the California Community Colleges (CCC). The report concludes that in order to serve the enrollment growth of the next decade, the three segments should move to year-round operations, which would enable the state to serve up to one-third more students.
12. As the last step, select *File/Close Reference*.

Let's add an example of a conference paper. Create a new reference in mylibrary with the information shown below. Be sure to select *Conference Proceedings* as the *Reference Type*. Try deciding on your own which information to enter in specific fields; see "Hints" below for some suggestions.

Here's the reference as you would see it presented in the ERIC database:

Accession Number: ED466740

Author: Carley, Michael.

Title: Community College Compressed Calendars: Results of a Student Survey and a Faculty Survey.

Date of Publication: May 2002

Subject Headings:

Block Scheduling

Community Colleges

\*Student Attitudes

Student Surveys

Summer Programs

\*Teacher Attitudes

Two Year Colleges

Year Round Schools

Abstract

This document reports that many community colleges are considering changes in their traditional semester calendars. In California, the most common question facing colleges is whether to switch from the traditional (in California) 18-week semester to a 16-week one. This paper details the results of a student and faculty survey conducted at Porterville College, a small community college in central California on the compressed calendar and related issues

Notes: 20 p., Paper presented at the Annual Meeting of the Research and Planning Group for the California Community Colleges (40th, Pacific Grove, CA, May 1-3, 2002).

**Hint:** Here's the best way to enter information about this conference paper into your EndNote library:

**Author:** Carley, Michael

**Year of Conference:** 2002

**Title:** Community College Compressed Calendars: Results of a Student Survey and a Faculty Survey

**Conference Name:** Annual Meeting of the Research and Planning Group for the California Community Colleges

**Conference Location:** Pacific Grove, CA

**Accession Number:** ED466740

**Date:** May (Note: for conferences, APA 5 format requires only the month, not the specific dates)

**Keywords:** Block Scheduling, etc.

**Abstract:** This document reports that many community colleges...

Close the New Reference window and look at these last two references in the Preview window. Notice that the ED number does not display. APA 5<sup>th</sup> style section 4.16, item 43, makes it clear that reports available through ERIC should contain the following statement: (ERIC Document Reproduction Service No. EDXXXXXX). In the next section, you'll add a new Output Style that includes this statement.

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

The APA 5<sup>th</sup> style supplied with EndNote has a few problems. For one, it does not include the ERIC Document Reproduction Service statement as required by APA 5<sup>th</sup>. (APA 5<sup>th</sup> p. 257)

Neither does this style include the “retrieved” statement for articles that are retrieved online. Retrieved [Month, Date Year] from the [Database name] database. (APA 5<sup>th</sup> p. 231).

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/education/sampleseduc.html>
2. Scroll to the *Add a New Output Style* section. Click on the *APA 5<sup>th</sup> ERIC Output Style*.
3. A *File Download* box will open asking if you want to save the file. Click *Save*.
4. 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>\_ERIC* and the *Save as type* box indicates *EndNote Style*.
5. Click *Save*.

Once the file is saved, 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> ERIC*. 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> ERIC*.

Now when you preview the Guyer 1999 reference in mylibrary, the ERIC Document Reproduction Service statement is properly formatted.

### **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 from APA 5<sup>th</sup>:

Fredrickson, B. L. (2000, March 7). Cultivating positive emotions to optimize health and well-being. *Prevention & Treatment*, 3, Article 0001a. Retrieved November 20, 2000, from <http://journals.apa.org/prevention/volume3/pre0030001a.html>

Borman, W. C., Hanson, M. A., Oppler, S. H., Pulakos, E. D., & White, L. A. (1993). Role of early supervisory experience in supervisor performance. *Journal of Applied Psychology*, 78, 443-449. Retrieved October 23, 2000, from PsycARTICLES database.

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

1. Open mylibrary.
2. Double click on the *Haser 2003* reference. Alternately, you can select the reference, then select *References/Edit References*.
3. Scroll to the *Access Date* field and enter today’s date, in the following format:  
October 26 , 2005.
4. Scroll to the *Name of Database* field. Enter `EbscoHost Academic Search Premier`. (Assume that you found the full text of this article in this database.)
5. Close the reference. In the Preview window, you should see the “retrieved” statement.

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