Research Methodology Workshop

Module 1

Referencing with EndNote

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Contact details

- ❑ To join our team of "Locum Research Consultancy Specialists and Workshop Facilitators", please click on this link: http://www.cintarch.org/research-consultancy/

- ❑ To access our "Research Consultancy Services", please click on this link: http://www.cintarch.org/research-consultancy-request/

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Outline

- **Introduction to EndNote**

- **Creating a New Library**

- **The EndNote interface**

- **Setting the referencing style**

- **Downloading references to your library**

- **Entering references manually**

- **Organizing your library into Group Sets and Groups**

- **Searching for the full text of a selected reference**

- **Inserting citations**

- **Formatting references**

- **Removing field codes**

Introduction to EndNote?

- EndNote is a bibliographic management program designed to import, store and organize your references.

- The program can automatically create and format bibliographies and in-text citations in many different referencing styles.

- An EndNote library may be equated to a file or folder containing the references you have found. A library can contain up to 100,000 references.

- Even though, it is possible to create several libraries, it is preferable to work with one library only for a particular dissertation.

Referencing with EndNote
To Create a New Library contd.:

- Click on the **EndNote** icon if it is already pinned to your **task bar**. The last library you used opens (if you had already created a library).

- Alternatively, go to **Start** > **Programs** > **Endnote**.

- Click on the **File** tab[1], and then click **New** [2].

- In the menu box that appears, type the name you want to give the file (e.g., **BMI and BP Study**) [3] in the File name box.

- Select the location where the folder you had created for your EndNote Library is located (e.g., **Desktop**) [4].

- Find the folder (i.e., **My EndNote Library**) [5], click on it, and then click **Open** [6].

- Finally click **Save**.

- A new **EndNote Library** appears on your screen.
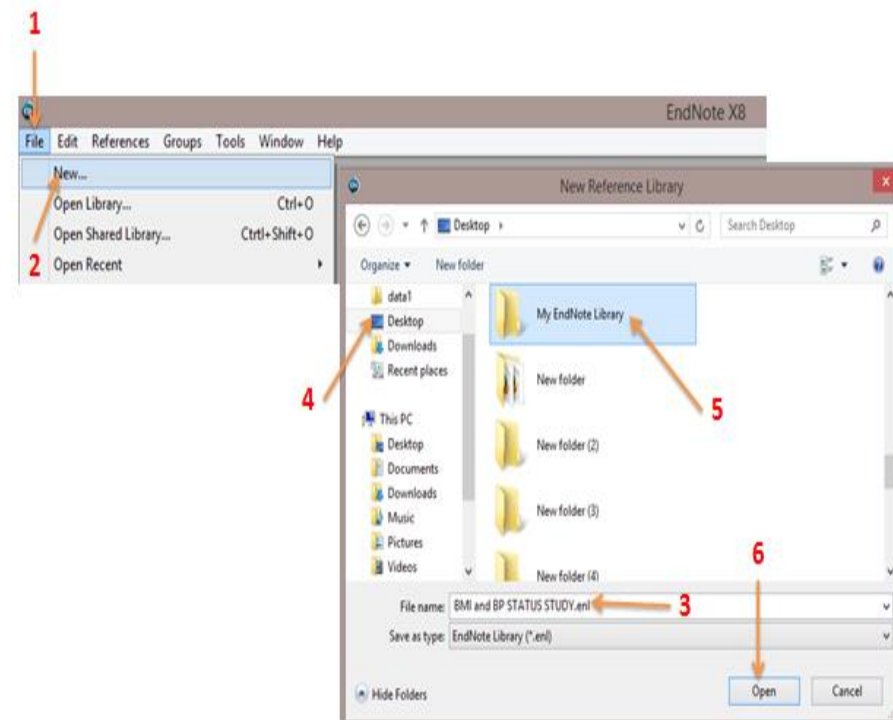
Referencing with EndNote contd.
To Create a New Library contd.:

- Your EndNote references are stored in a database called a **Library**. EndNote libraries have the file extension **.enl**. This is the file you open.

- Each library has a corresponding folder with the extension **.data**. This folder will have the same name as the library, and it is where images, PDF files etc are stored.

- If you move, copy, rename or delete a library, remember to do the same with its corresponding Data folder.

- There is no limit to the number of references you can store in a library, but it is recommended that you do not exceed 100,000 to maintain efficient performance of the database.
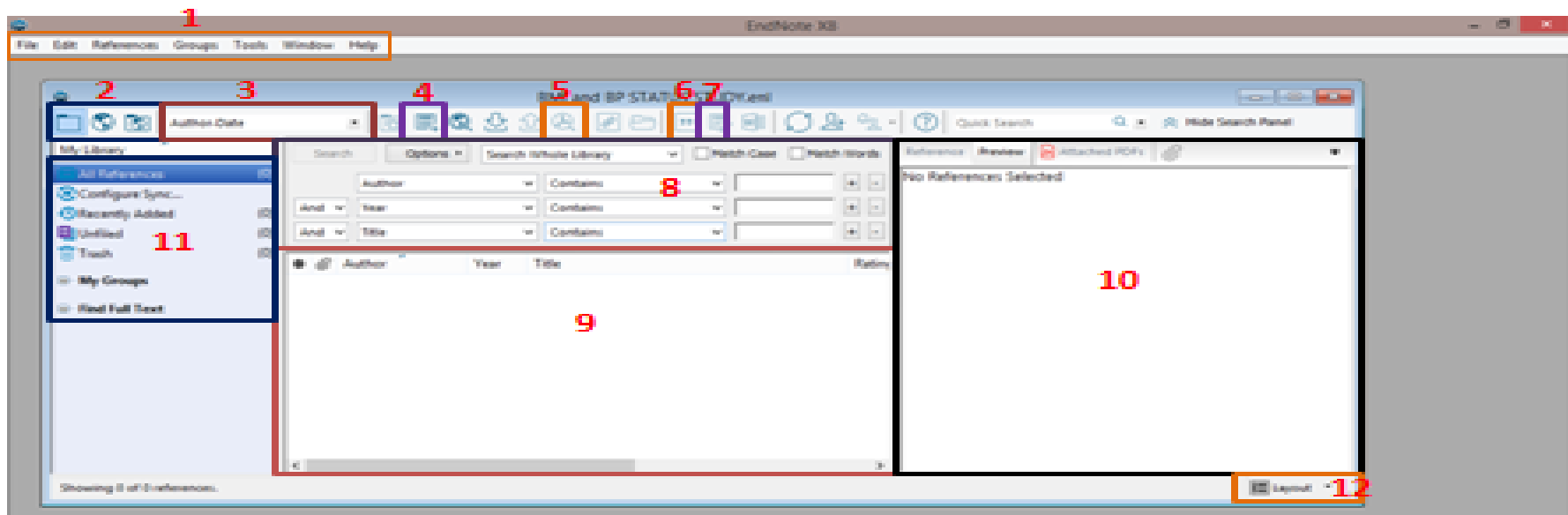
My EndNote
Library.enl

My EndNote
Library.Data

Referencing with EndNote contd.
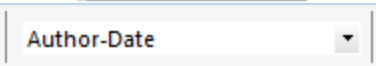# The EndNote Interface:

1. Main tabs (including File, Edit, References, groups, Tools, Window and Help) for specific functions.

2. Search / connectivity modes (i.e., local library [a], online search [b] and integrated [c] modes).

3. For setting the reference style.

4. For adding a new reference to the selected group.
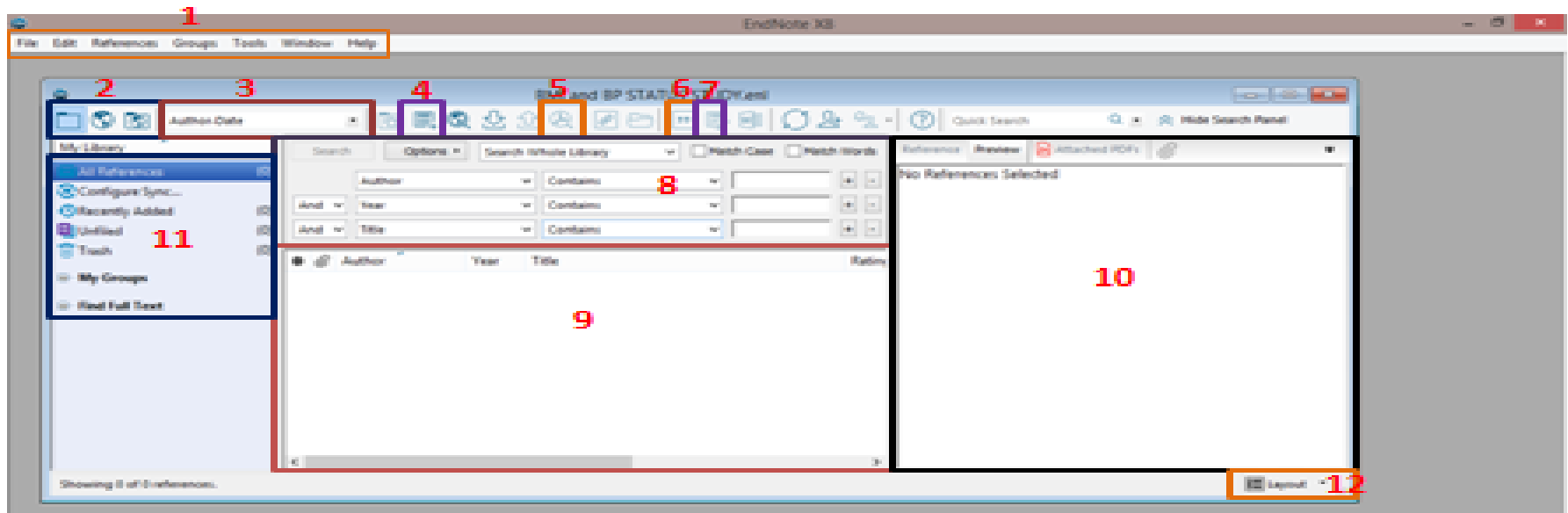

5. For finding the full text.

6. For inserting citation (into your word document).

Referencing with EndNote contd.
The EndNote Interface contd:

7. For formatting bibliography (in word).

8. For entering the search instructions.

9. The **Reference list** Pane: Contains the list of the references found.

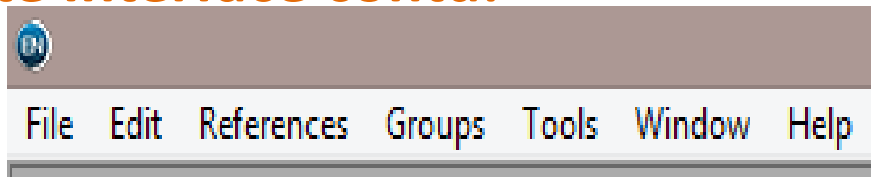10. The **Tabs** Pane: This includes tabs of functions such as Reference, Preview and Attached PDF.

11. Groups Pane: These are subsets of references saved for easy retrieval.

12. For changing the layout of the interface.

Referencing with EndNote contd.
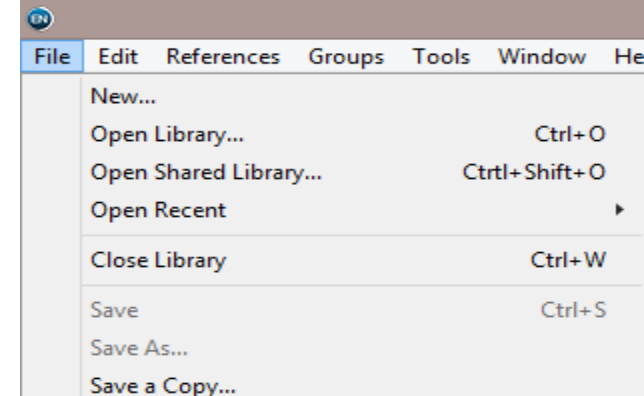# The EndNote Interface contd:
Main tabs:

File Edit References Groups Tools Window Help

- **File tab**: Clicking on the File tab displays a dialog box which contains options such as New, Open Library, Close Library, Save, Save As, Save a Copy, Revert, Export, Import, print, etc..

- **Edit tab**: This contains functions such as Cut, Paste, Clear, Select All, Find and Replace, Font, Size, Style, Output styles etc.

- **References tab**: This tab allows you to create new Reference, Edit References, Copy References To, E-mail References, to Find References Updates, Find Duplicates, etc.
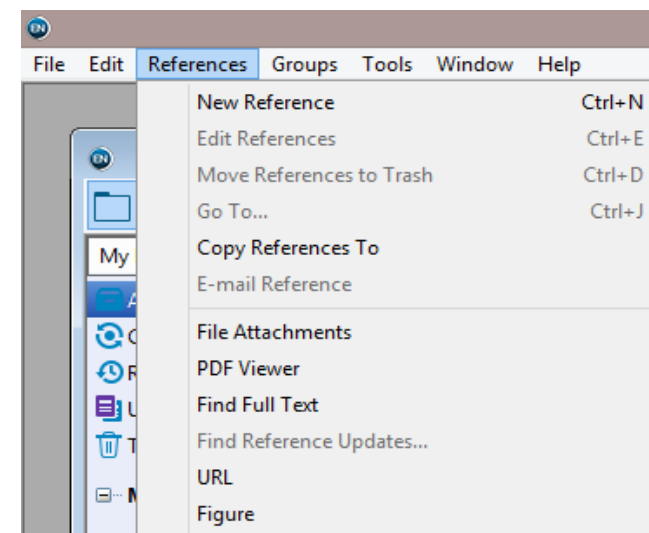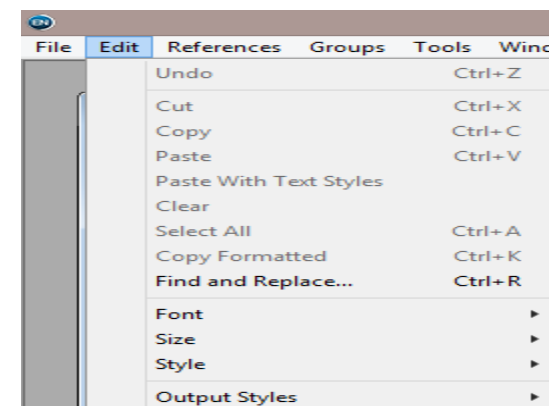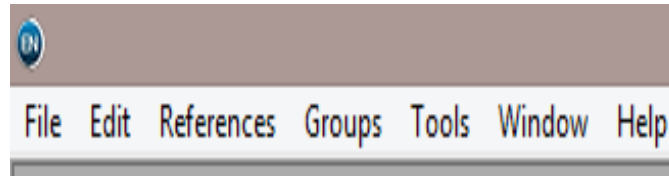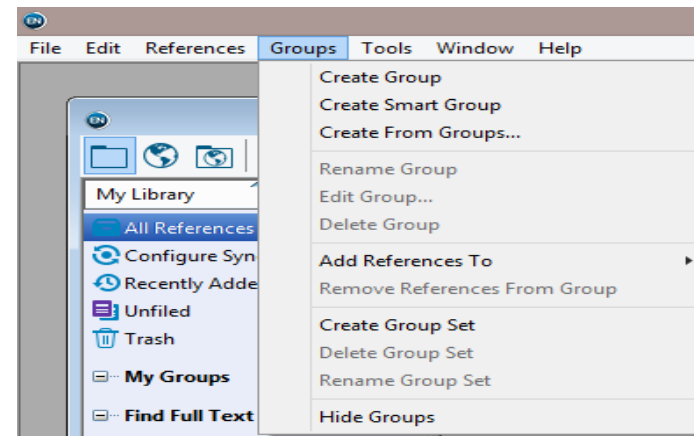
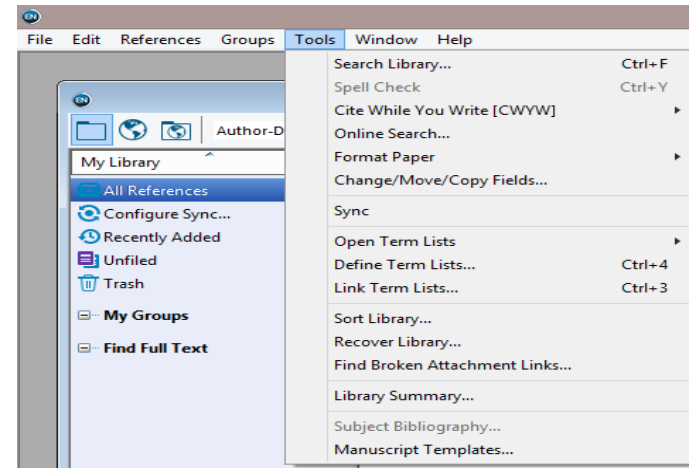# Referencing with EndNote contd.
The EndNote Interface contd:
# Main tabs contd.:

- **Groups tab**: This contains functions such as Create Group, Create Smart Group, Add References To, Create Group Set, hide Groups, etc.
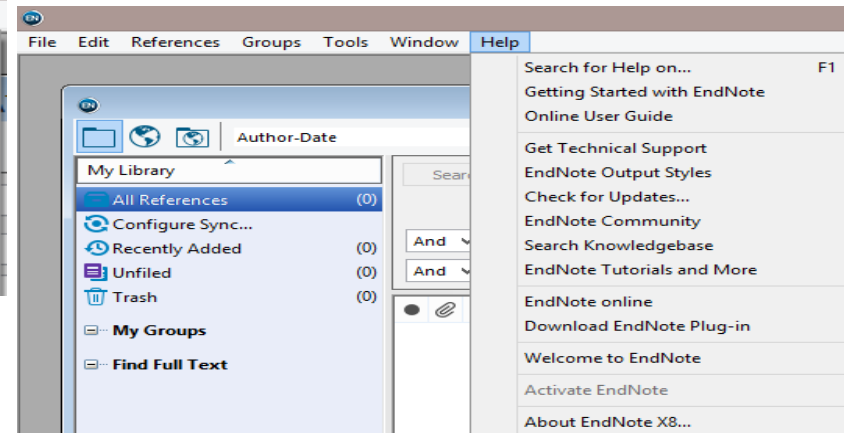

- **Tools tab**: This contains functions such as Search Library, Cite While You Write, Online Search, Format Paper, Sort Library, Library Summary, etc.

- **Window tab**: This contains functions such as Tile Vertically or Horizontally, Arrange Icons, and Close All Libraries.
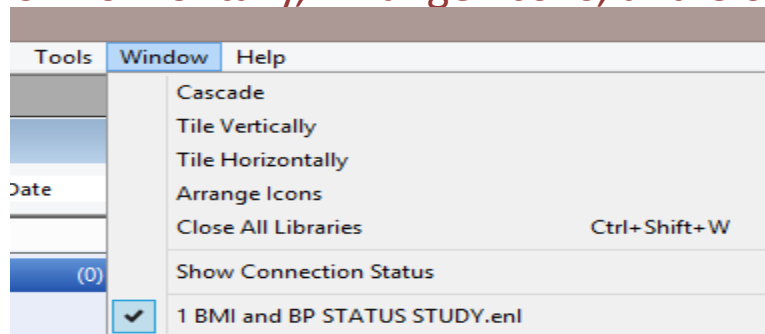

- **Help tab**: This contains information on EndNote, EndNote Training, EndNote Web, etc.

Referencing with EndNote contd.

To set the reference style.

- Click on the drop down arrow next to the **Reference Style** box [1], and select the style you want (e.g., **Author Date**) [2] from the menu box that appears.

- If the style you want is not available in the box, click **Select Another Style** [3], and use the **scroll bar** [4] to find the style you want in the **Choose A style** menu box that appears.

- Click the style you want, and click **Choose** [5].

- If you want to change to another style, repeat the procedure and choose the style you want.
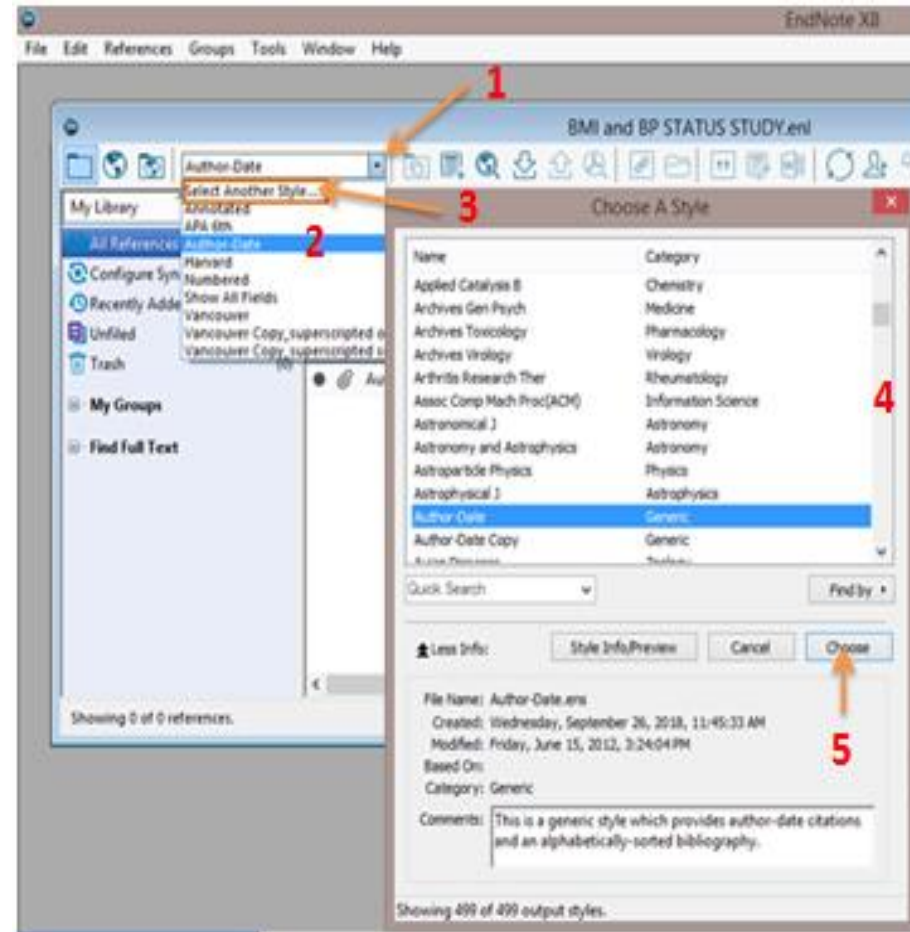
Referencing with EndNote contd.

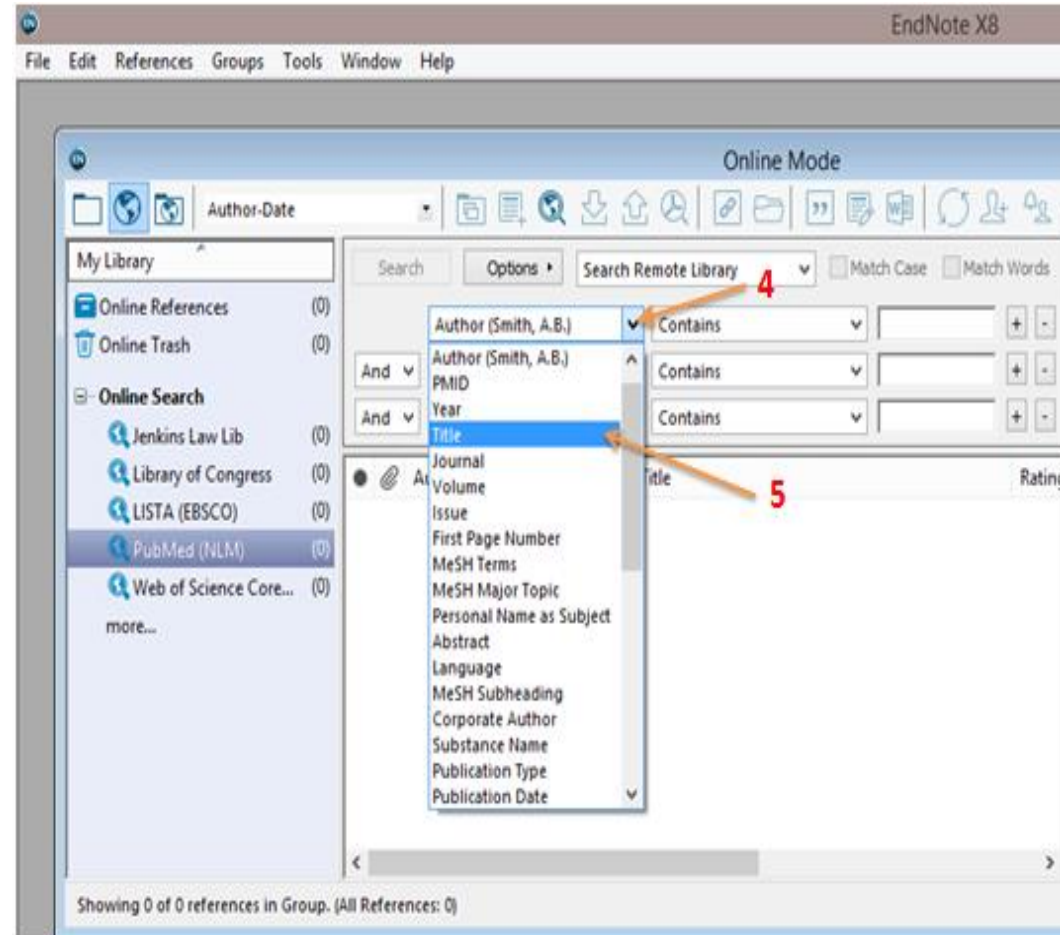## To download references to your library:

- Connect your computer to the internet.

- Open the library (file) you want to download references to.

- Click on the **online search** icon [1], (but it is preferable to use the integrated mode while searching for the first time so that the records also enter your local library at the same time).

- Select the search engine you want (e.g., **PubMed**) [2], from the **Online Search** engines that appear.

- The **Connecting to Host** box [3]appears with a bar showing the progress of the connection. Wait for it to connect.
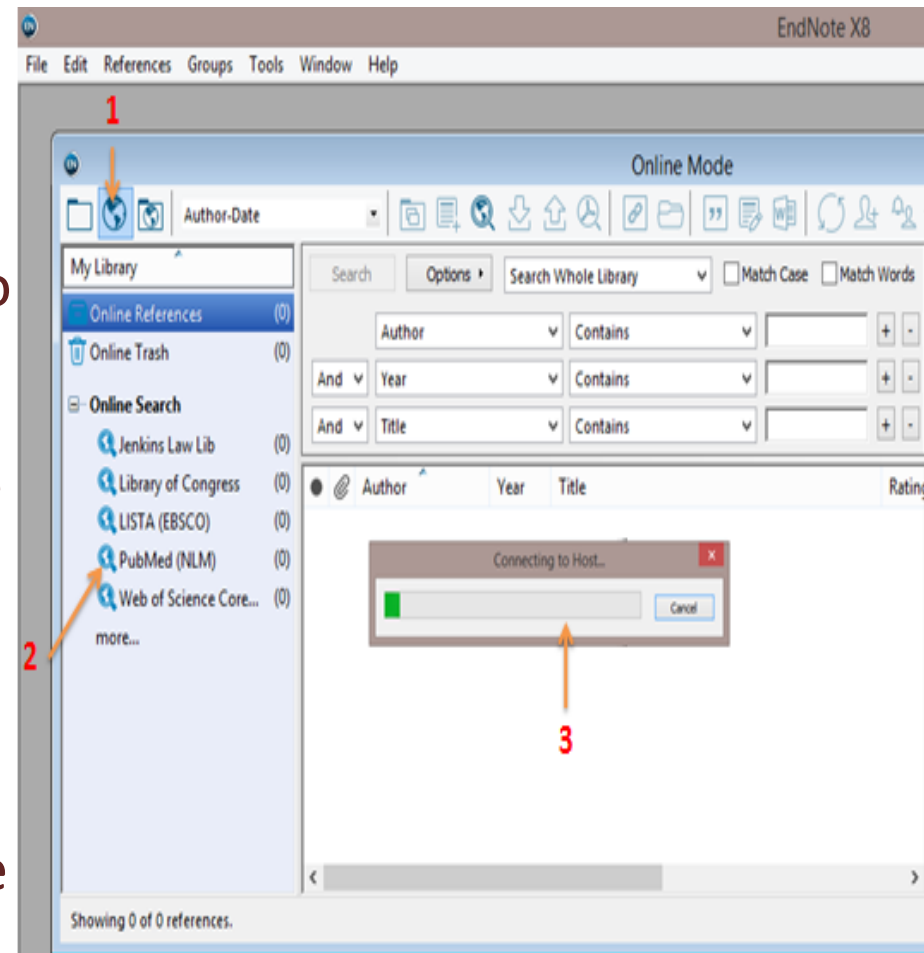
Referencing with EndNote contd.
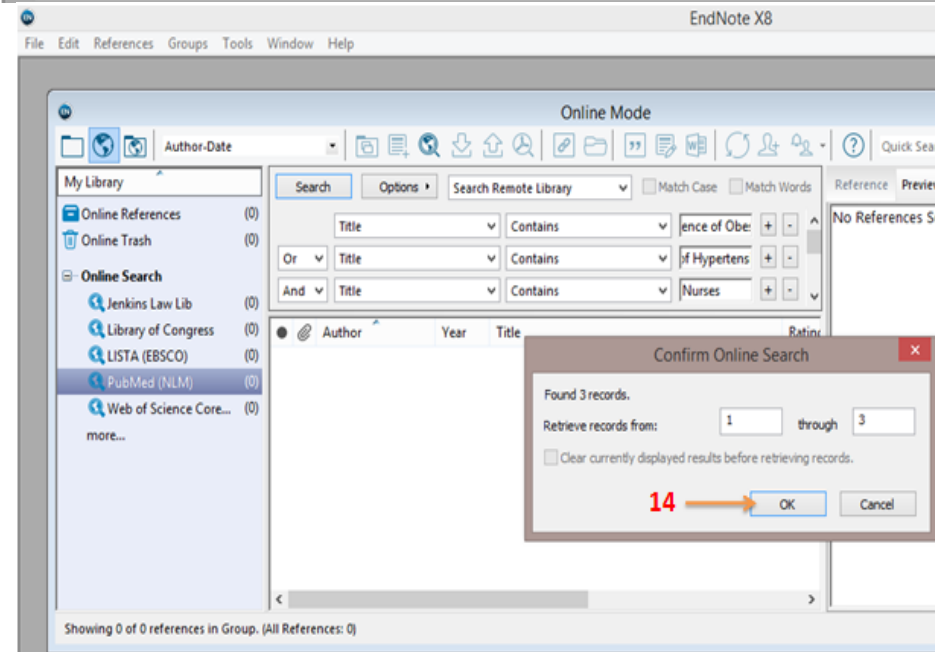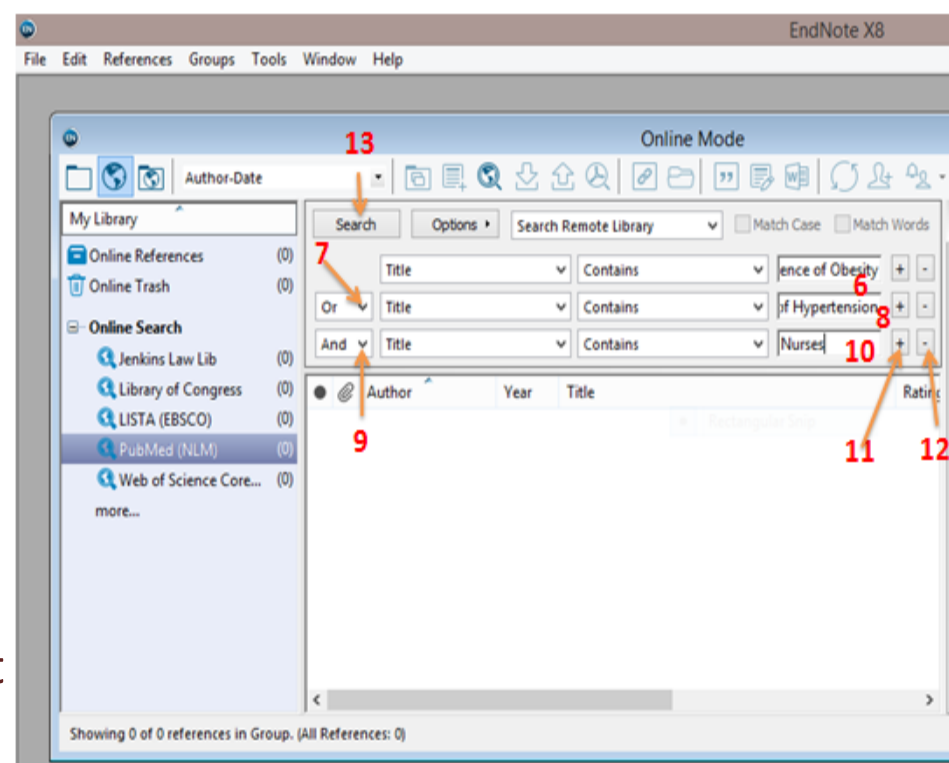
To download references to your library:

- Click on the drop down arrow next to the **search term** box [4], and select **Title** from the menu box that appears [5].

- You may wish to search with other options such Authors' name, Journal, Year of publication, Publication type or date, etc.

Referencing with EndNote contd.

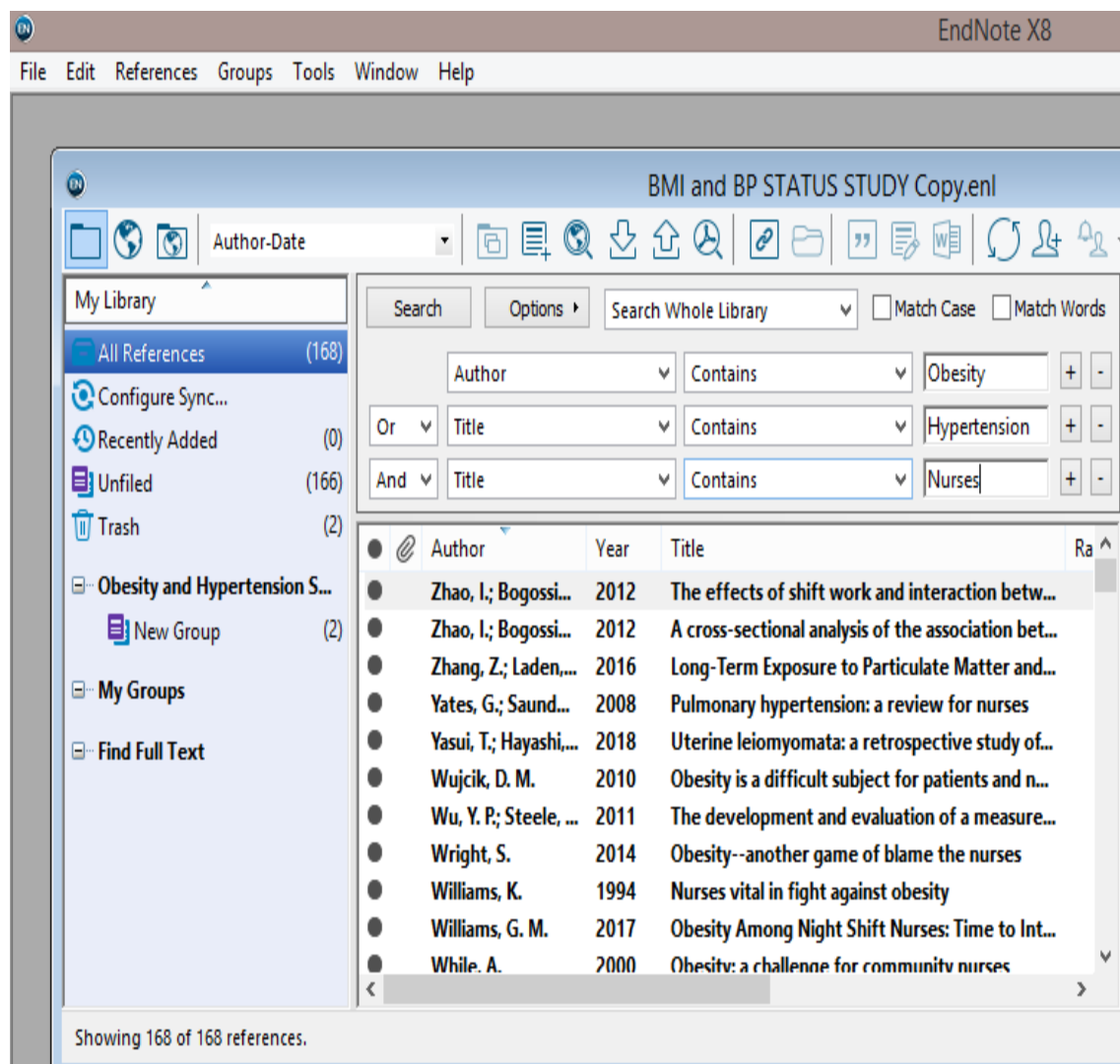## To download references to your library contd.:

- Type **Prevalence of obesity** [6] in the box for entering what the search term should contain.

- Click on the drop down arrow next to the options box [7] and select **Or** from the options that appear.

- Type **Prevalence of hypertension** [8] in the corresponding box for entering what the search term should contain.

- Click on the drop down arrow next to the options box [9] on the next level and select **And** from the options that appear.

- Type **Nurses** [10] in the corresponding box for entering what the search term should contain.

- To add or delete a search level, click on the box with plus [11] or minus [12] sign.

- Click **Search** [13].

- It was able to retrieve 3 records, click **OK** [14].

Referencing with EndNote contd.

## To download references to your library contd.:

- It is preferable to search with the key terms (e.g., **Obesity** instead of **Prevalence of obesity** and **Hypertension** instead of **Prevalence of hypertension**).

- This yields more results, considering the fact that many authors may not necessarily include the word prevalence in the title of their work.

- In this case 168 records were retrieved by searching with the key terms.

Referencing with EndNote contd.

**To download references to your library contd.:**

- Clicking on the **Preview** tab [15] gives a preview of the **citation** [16].

- Clicking on the **Reference** tab [17] gives the full details of the article, including the **Abstract** [18].

- After going through the abstracts, you may delete those that are not relevant to your study in your local library.

- References that are not available online, can be entered manually.
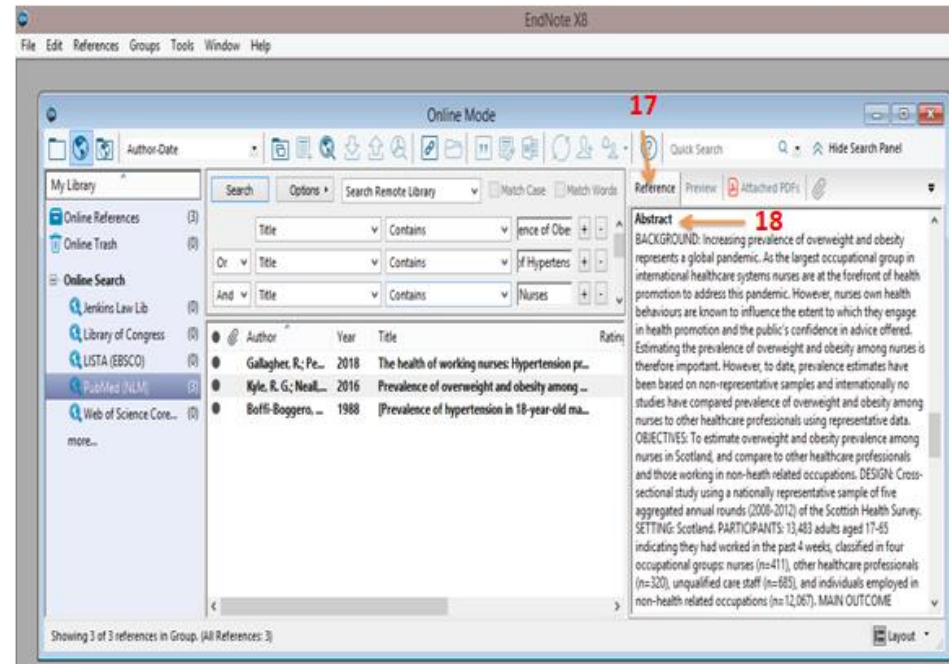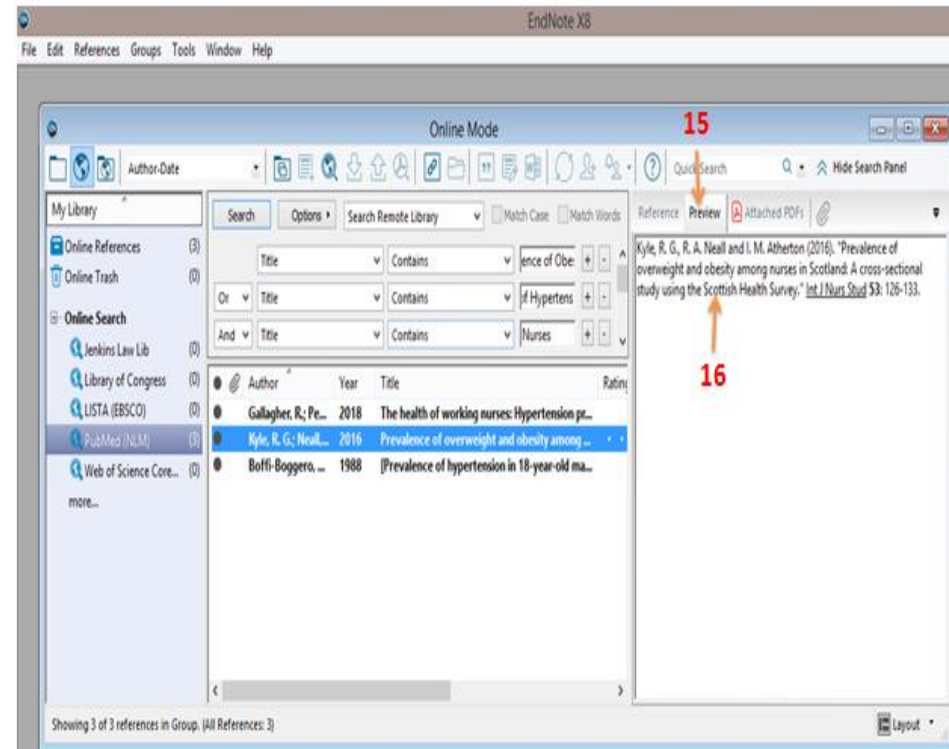
Referencing with EndNote contd.

To enter references manually:

- Click on the **References** tab [1], and select **New Reference** [2] in the menu box that appears.

- Alternatively, click the **New Reference** button [3] on the toolbar.

- In the New Reference box that appears, use the drop down arrow [4] to select a **Reference Type** (e.g. **Journal Article**) [5].

- Enter the reference data in the relevant fields.
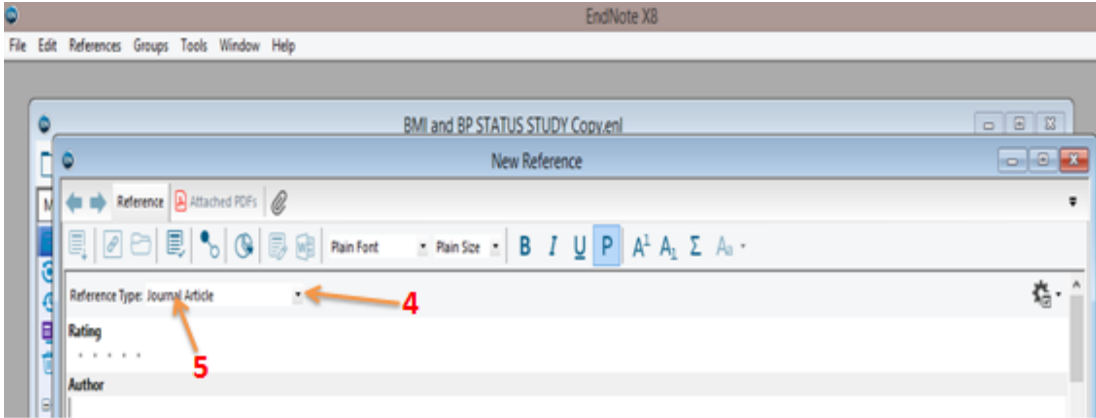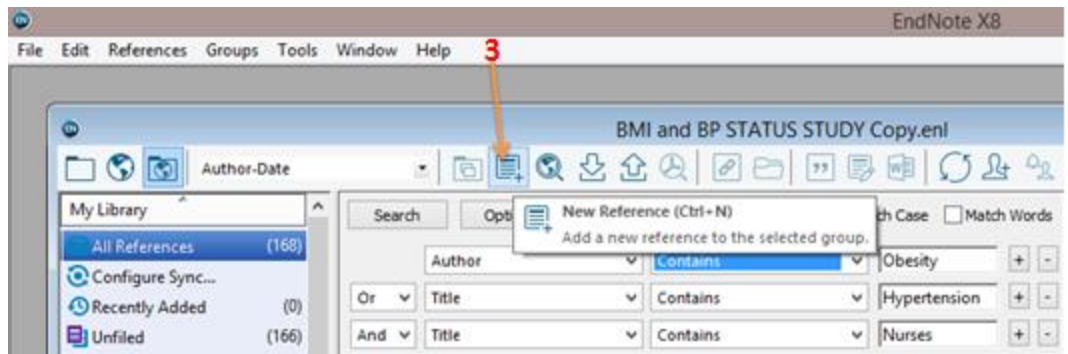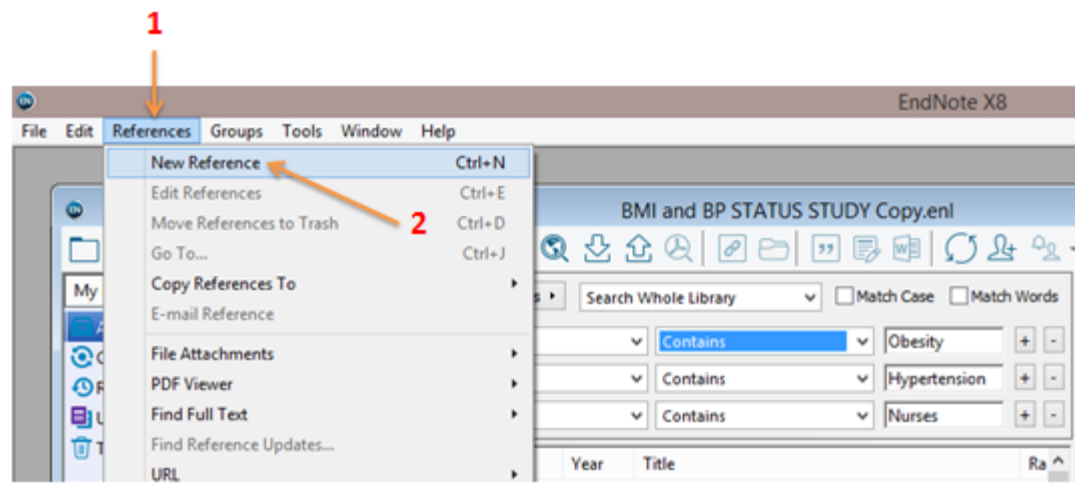
Referencing with EndNote contd.
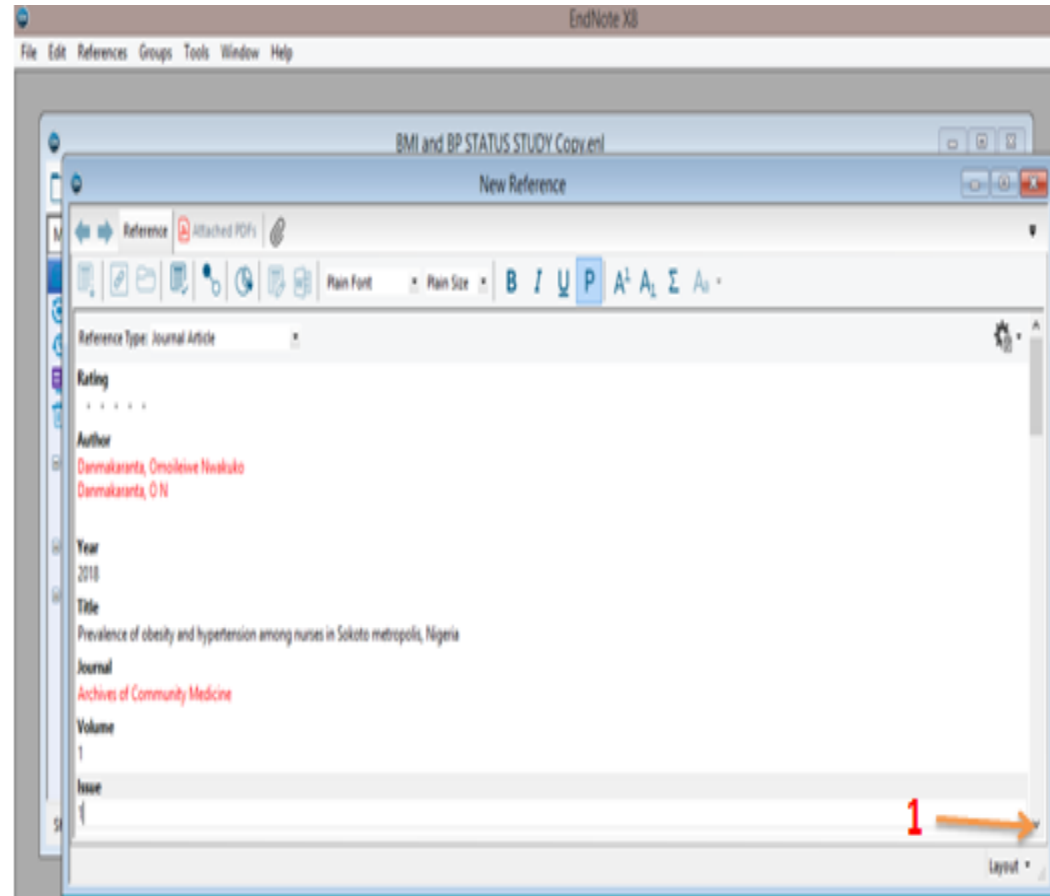
To enter references manually contd.:

- For author's names: Type the surname, then a comma, then a space, and then the first name(s) with no full stop (e.g., **Danmakaranta,** Omoileiwe Nwakuko)

- Or , type the surname, then a comma, then a space, then the initials separated by a space (e.g., **Danmakaranta,** O N).

- For a corporate author, type the full name followed by a comma (e.g., **World Health Organization,**).

- The comma after a name tells EndNote that it needs to remain as entered.

- Only type one author's name per line, press **Enter** to go to a new line.

17
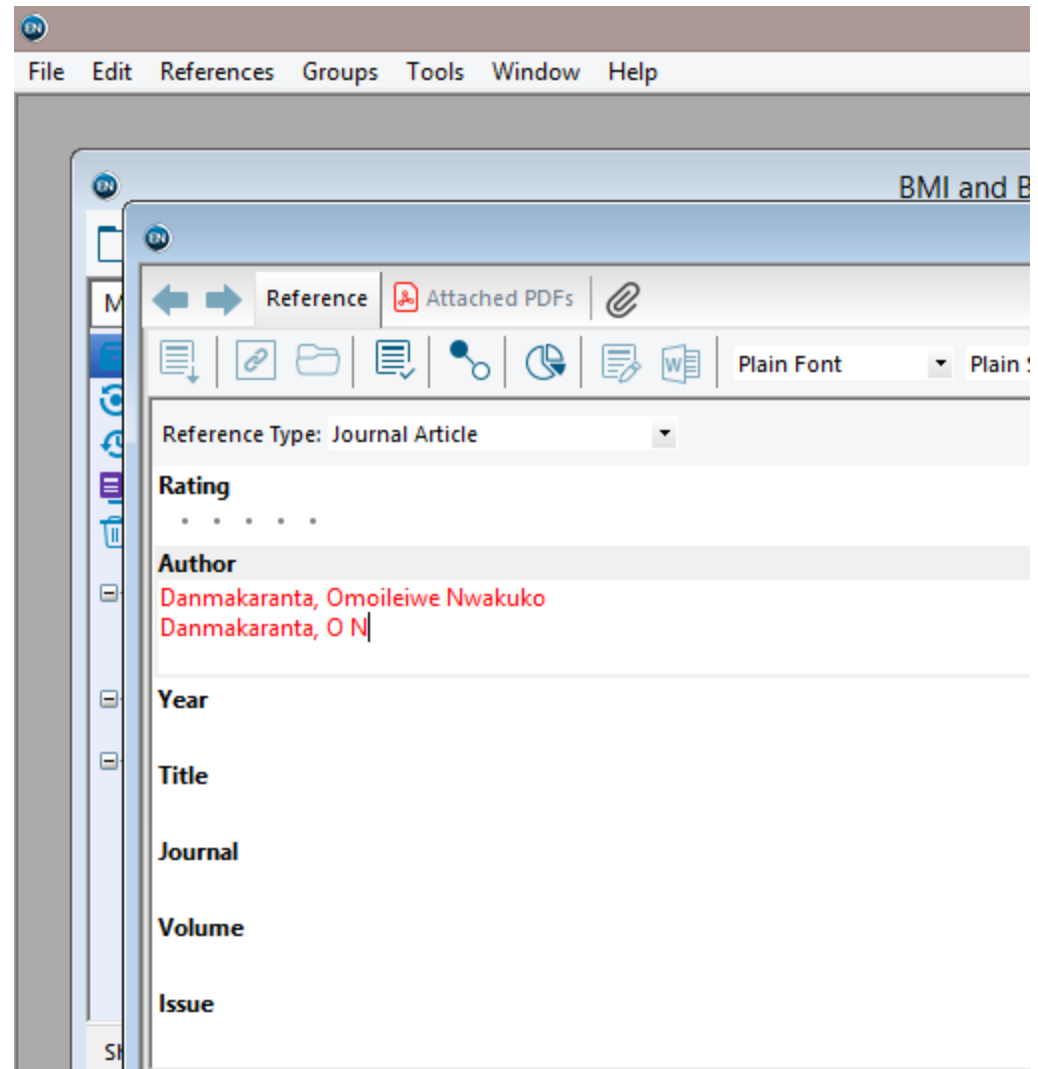
Referencing with EndNote contd.

To enter references manually contd.:

- Omit punctuation from the end of any entry (other than for the author/s) as EndNote formats the references.

- Use the **Tab** key to move to the next field.

- Use the arrow on the scroll bar [1] to scroll down to the remaining fields.

- You do not need to type '**vol.**', '**p.**', '**pp.**' in the volume and pages fields.

Referencing with EndNote contd.

To enter references manually contd.:

- Click **File** [2], select **Save** [3], and close the **New Reference** window by clicking the small **x** button [4] at the upper right.
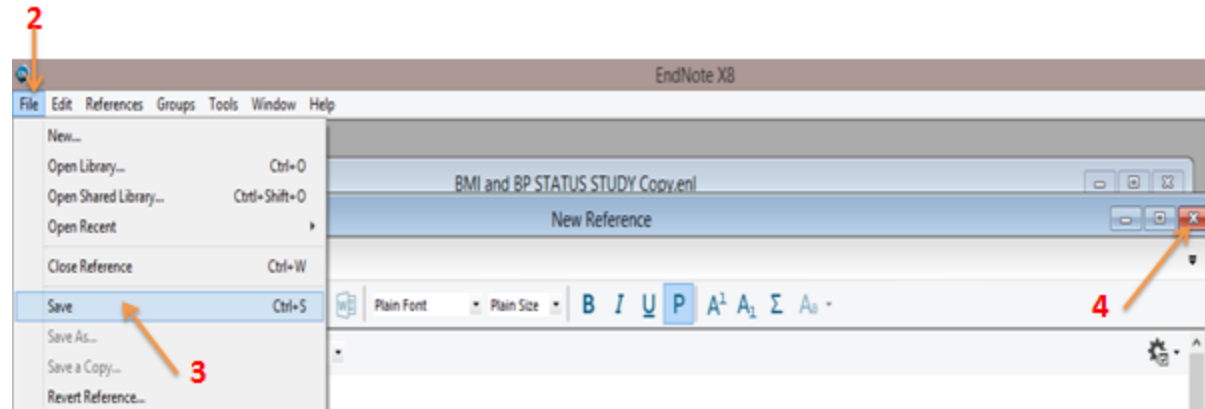
- The newly entered reference [5] appears on the **Reference list** Pane (according to its alphabetical order).
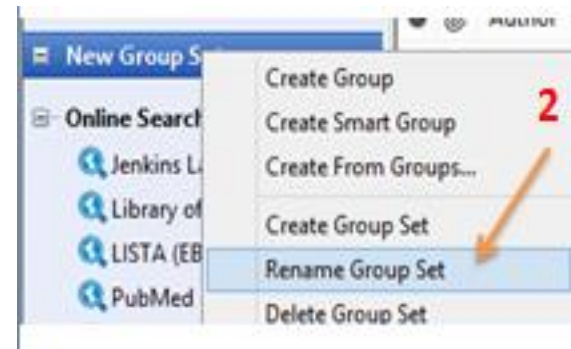- Repeat the procedure for the other references one by one.
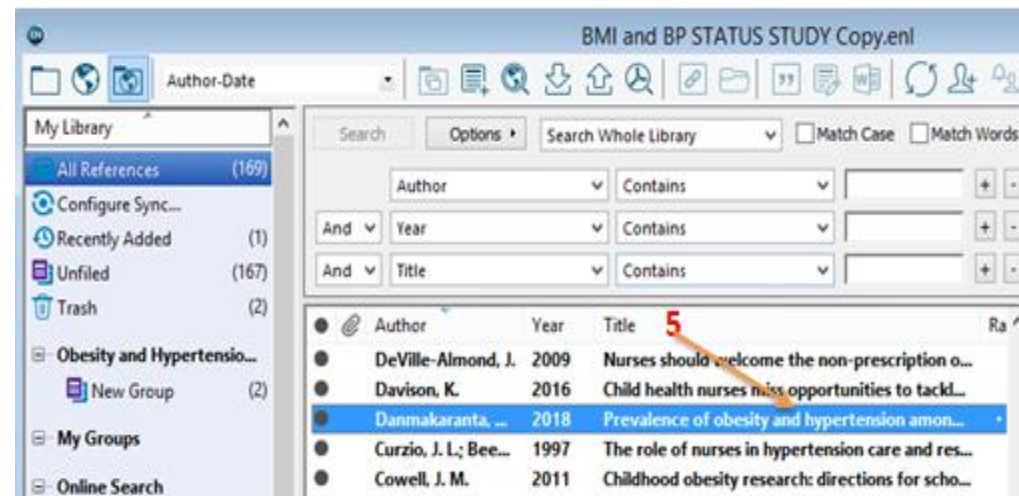
Referencing with EndNote contd.

Organizing your library into Group Sets and Groups:

- If you want to have a single library for all your research works (instead of having a separate library for each study) all you need to do is to create group sets (i.e., a group set for each study).

- There is always a default **New Group Set** [1] which you can assign to your first study , all you need to do is to rename it (i.e., replace it with the name of your study [e.g. **BMI and BP Status Study**]).

To rename the default New Group Set:

- Right-click on the default **New Group Set** and click **Rename Group Set** [2] in the menu box that appears.

- The box becomes active, type the name of your study in the box (e.g., **BMI and BP Status Study**) [3], to replace the default **New Group Set** and press **Enter**.
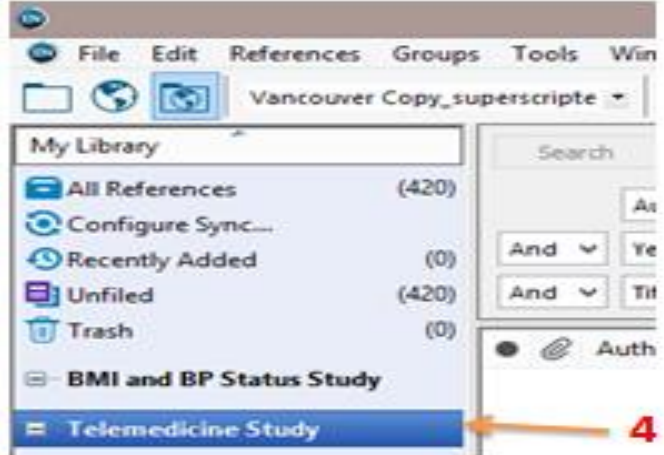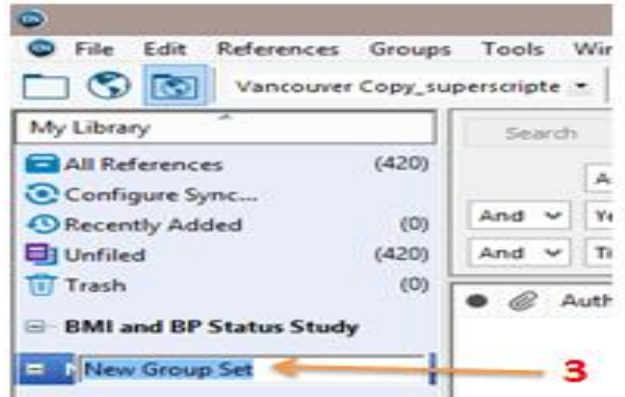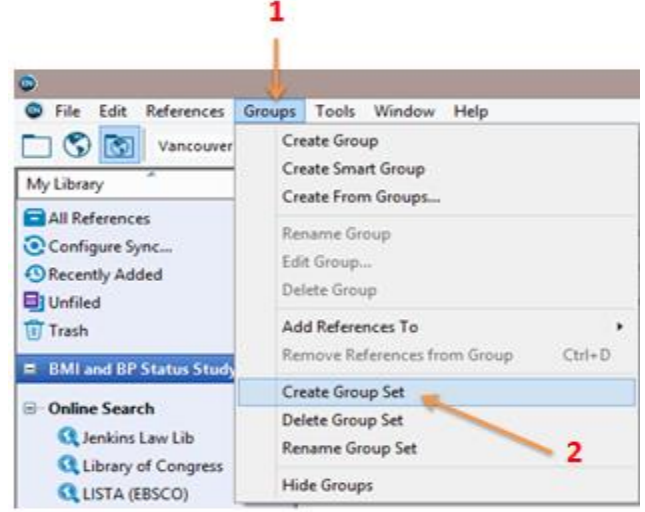
Referencing with EndNote contd.

Organizing your library into Group Sets and Groups contd.:

- You only need to create a new group set if the default **New Group Set** has been assigned to a study.

To create a new group set :

- Click on **Groups** tab [1], and then click **Create Group Set** [2] in the menu box that appears.

- In the **New Group Set** box [3] that appears with an active field, type the name of your new study (e.g., **Telemedicine Study**) and press **Enter** [4].

- Repeat the procedure for your subsequent studies.

Referencing with EndNote contd.

Organizing your library in Group Sets and Groups contd.:

- You can now organize each **Group Set** in **Groups**; for example, for the **BMI and BP Status Study** you can create groups for the respective chapters of the dissertation (**Chapter 1: Introduction**; **Chapter 2: Literature Review**; **Chapter 3: Materials and Methods**; and **Chapter 5: Discussion**).

To create a new group:

- Right-click on the **Group Set** for which you want to create **Groups** (e.g., **BMI and BP Status Study**) [1], and then click **Create Group** [2] in the menu box that appears.

- In the **New Group** box that appears [3], type the name of the Group (e.g., **Chapter 1: Introduction**) [4] and press **Enter**.
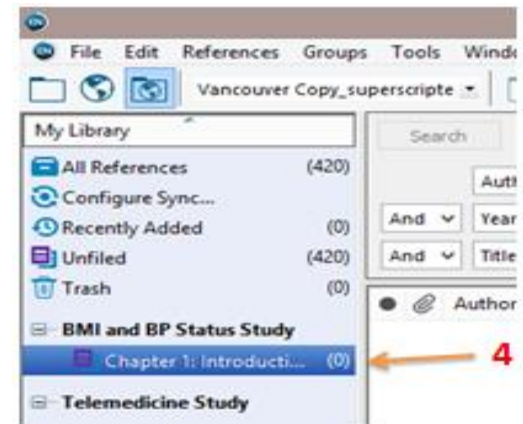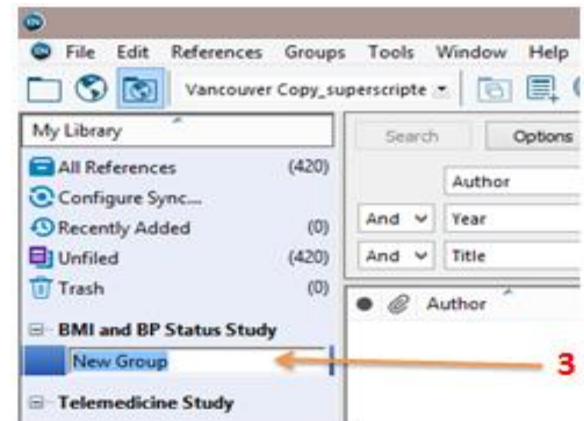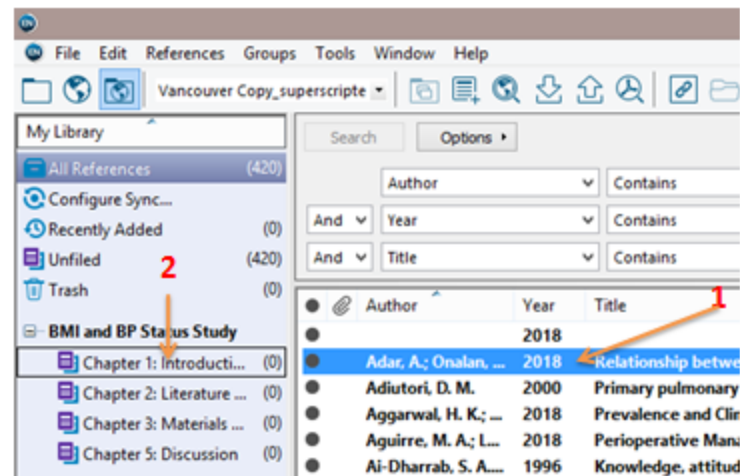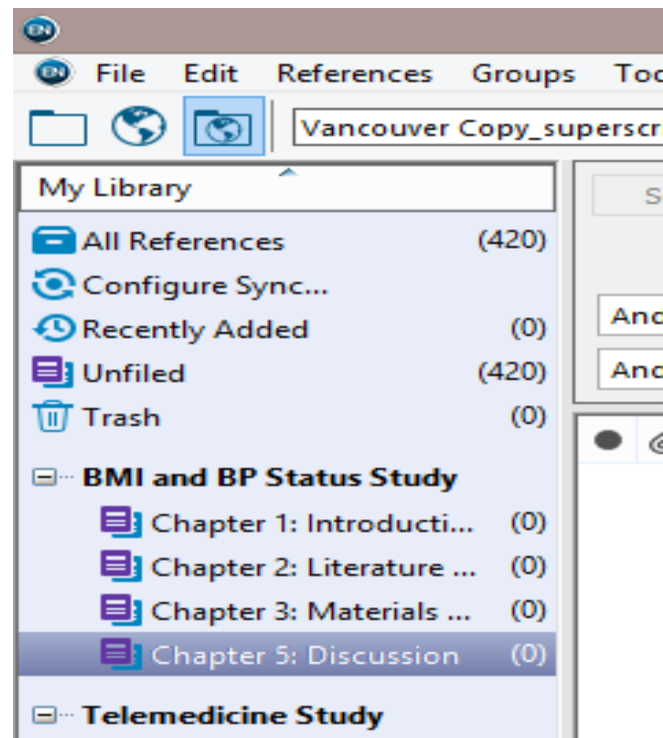
Referencing with EndNote contd.

To create a new group contd.:

- Repeat the procedure for the remaining groups (i.e., **Chapter 2: Literature Review**; **Chapter 3: Materials and Methods**; and **Chapter 5: Discussion**).
- The next thing to do is to select and move the references into the groups you want them to be.

To move a reference to a group:

- Click on the reference you want to move to a group[1].
- Hold down the Left button of your cursor and drag the selected reference into the group you want it to be (e.g., **Group 1: Introduction**) [2].
- Repeat the procedure for the other selected references.

Referencing with EndNote contd.

Searching for the full text of a selected reference:

- EndNote allows you to search for the full text (pdf version) of the references you have selected if they are available online (open access).

To search for the full text of a selected reference (pdf version):

- Connect your computer to the internet.
- Click on the reference you want to find the full text [1], and then click the **Find Full Text** button [2].
- The task shows (i.e., **searching** for the full text) in the **Find Full Text** group [3]. After the search, the number of references **Found** and those **Not found** are also indicated.
- Go to the **Tab pane** and click on the **pdf** icon of the full text found [4] to open it.
- Finally, click on the **Save** button [5] to save it in a folder named **PDF** inside the **EndNote Library.Data** folder.
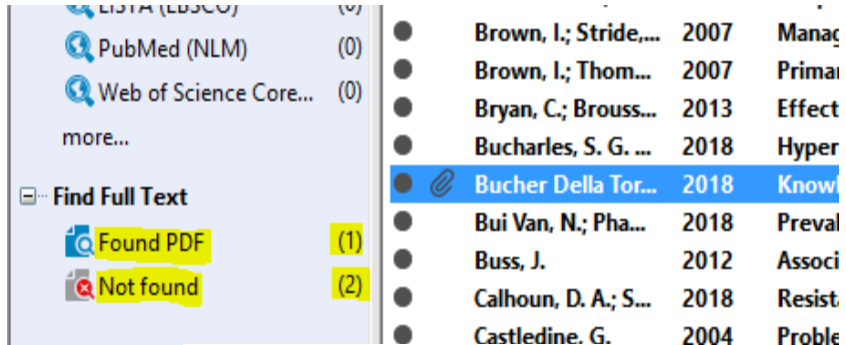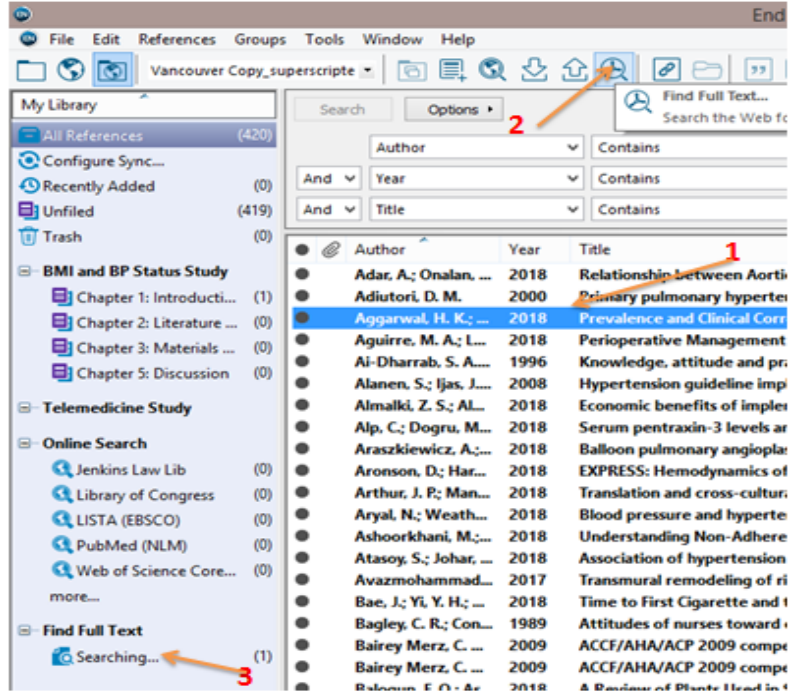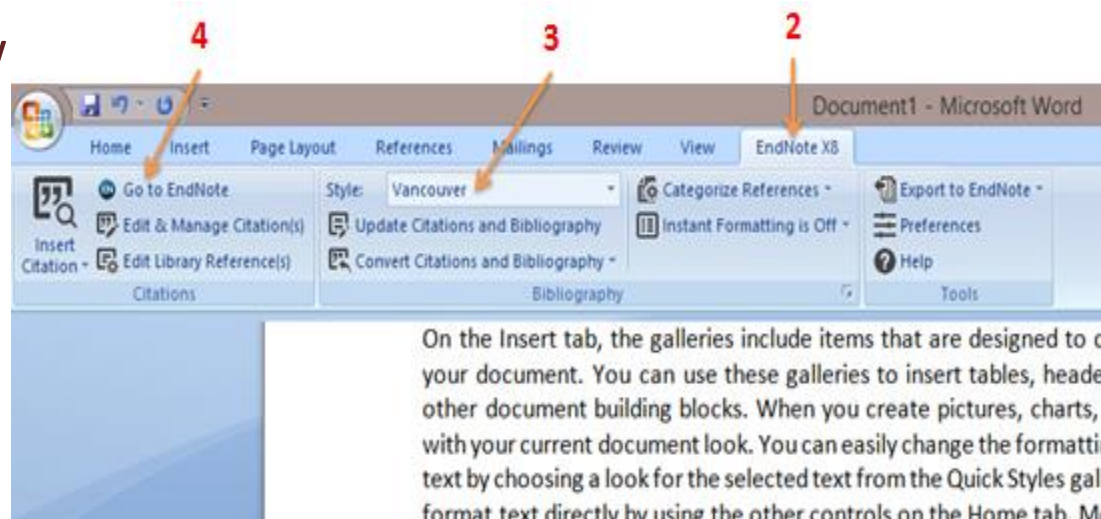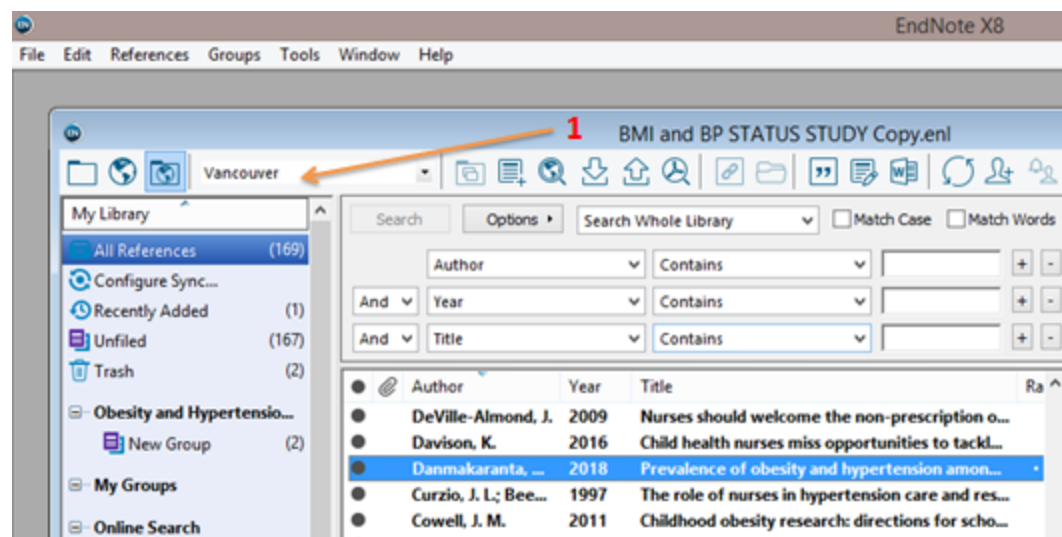
Referencing with EndNote contd.

To insert a citation:

- Open the EndNote library for the study and select the referencing style you want (e.g., **Vancouver**) [1].

- Open the MS Word document, place your cursor where you want to insert the citation and click on the **EndNote** tab [2].

- Go to the **Bibliography** group and use the drop down arrow in the **Style** box to find and then select the referencing style you had selected in the Endnote library (i.e., **Vancouver**) [3].

- Go to the **Citations** group and click on **Go to EndNote** [4].

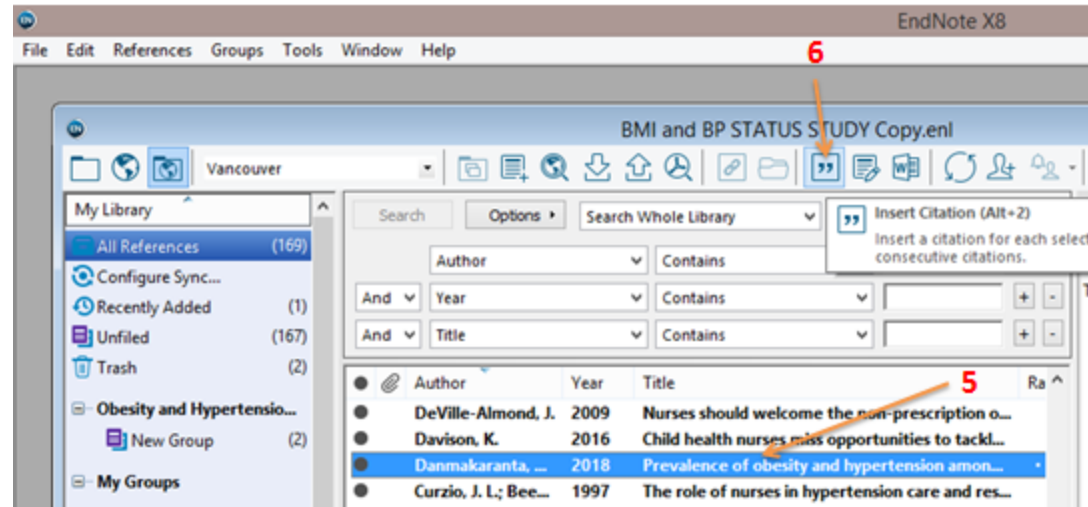- This takes you directly to the EndNote library.

Referencing with EndNote contd.

To insert a citation contd.:

- Click on the citation you want to insert [5].
- Click on the **Insert Citation** button [6].

- The in-text citation appears as an Arabic Numeral (e.g.,**1**) [7] in the body of the text.

- The complete citation appears in your reference list (i.e., under the **REFERENCES** section) [8].

To change the looks available in the Quick Style gallery, use the Change Current Quick Style Set command. Both the Themes gallery and the Quick Styles gallery provide reset commands so that you can always restore the look of your document to the original contained in your current template. On the Insert tab, the galleries include items that are designed to coordinate with (1)text in the document text by choosing a look for the selected text from the Quick Styles gallery on the Home tab. You can also format text directly by using the other controls on the Home tab.
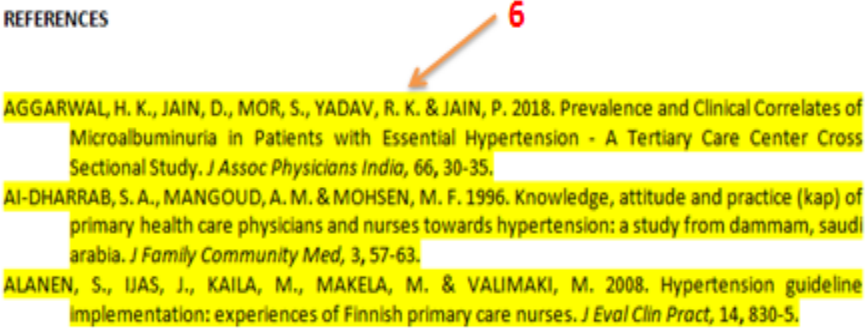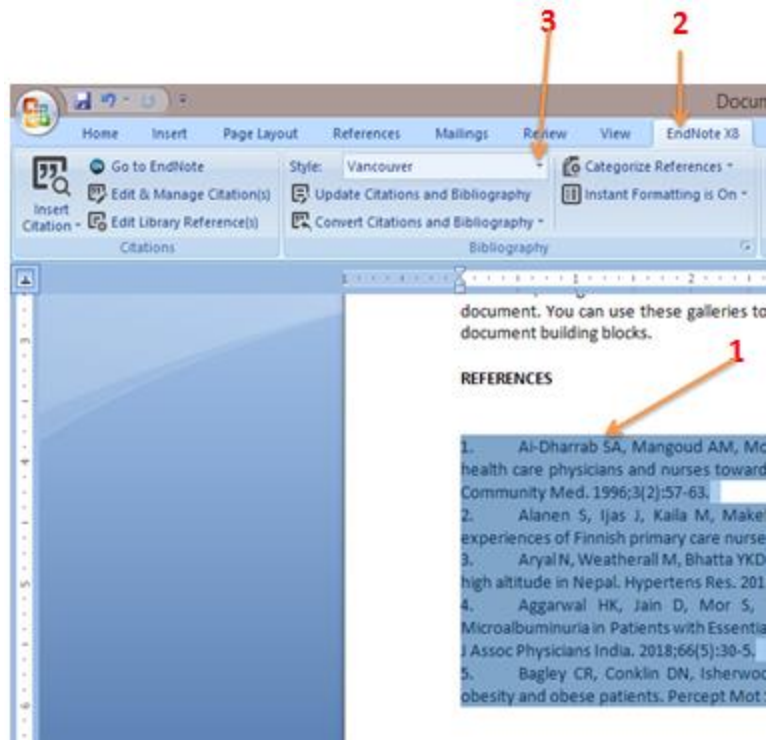
REFERENCES

1. Danmakaranta ON, Danmakaranta ON. Prevalence of obesity and hypertension among nurses in Sokoto metropolis, Nigeria. Archives of Community Medicine. 2018;1(1):1-7.

Referencing with EndNote contd.

Formatting the references:

To change the referencing style (e.g., from Vancouver to Havard):

- Highlight the whole references in the references list in your MS word document [1] .

- Click on the **EndNote** tab [2].

- Use the drop down arrow next to the **Style** box [3] to find and select the referencing style you want (e.g., Havard) [4].

- The referencing automatically changes to the new style both in the text [5] and reference list [6] .

Referencing with EndNote contd.

Formatting the references contd.:
To change the referencing style (e.g., from Vancouver to Havard contd.):

- The next thing to do is to edit the selected referencing style to be in line with the format of the institution concerned (e.g., **Usmanu Danfodiyo University, Sokoto** [**UDUS**]).

Havard

AGGARWAL, H. K., JAIN, D., MOR, S., YADAV, R. K. & JAIN, P. 2018. Prevalence and Clinical Correlates of Microalbuminuria in Patients with Essential Hypertension - A Tertiary Care Center Cross Sectional Study. *J Assoc Physicians India,* 66**,** 30-35.

Differences:

- In the **UDUS** format as compared to the **Havard** style:
- Only the first letter of the authors' surname is capitalized.
- There is no comma after authors' surnames.
- There is no full stop after authors' initials; and there is no space between them.
- The year is enclosed in round brackets ().
- Full stop is inserted after the journal title (instead of comma in Harvard).
- Colon is inserted after the journal's volume (instead of comma in Havard).

UDUS

Aggarwal HK, Jain D, Mor S, Yadav RK, Jain P (2018). Prevalence and Clinical Correlates of Microalbuminuria in Patients with Essential Hypertension - A Tertiary Care Center Cross Sectional Study. *J Assoc Physicians India.* 66**:** 30-35.

Referencing with EndNote contd.

Formatting the references contd.:

To edit Havard style:

- Click on the **Edit** tab [1].

- Click **Output Styles** [2] in the menu box that appears, and then click **Edit "Havard"** [3] in the new menu box that appears.
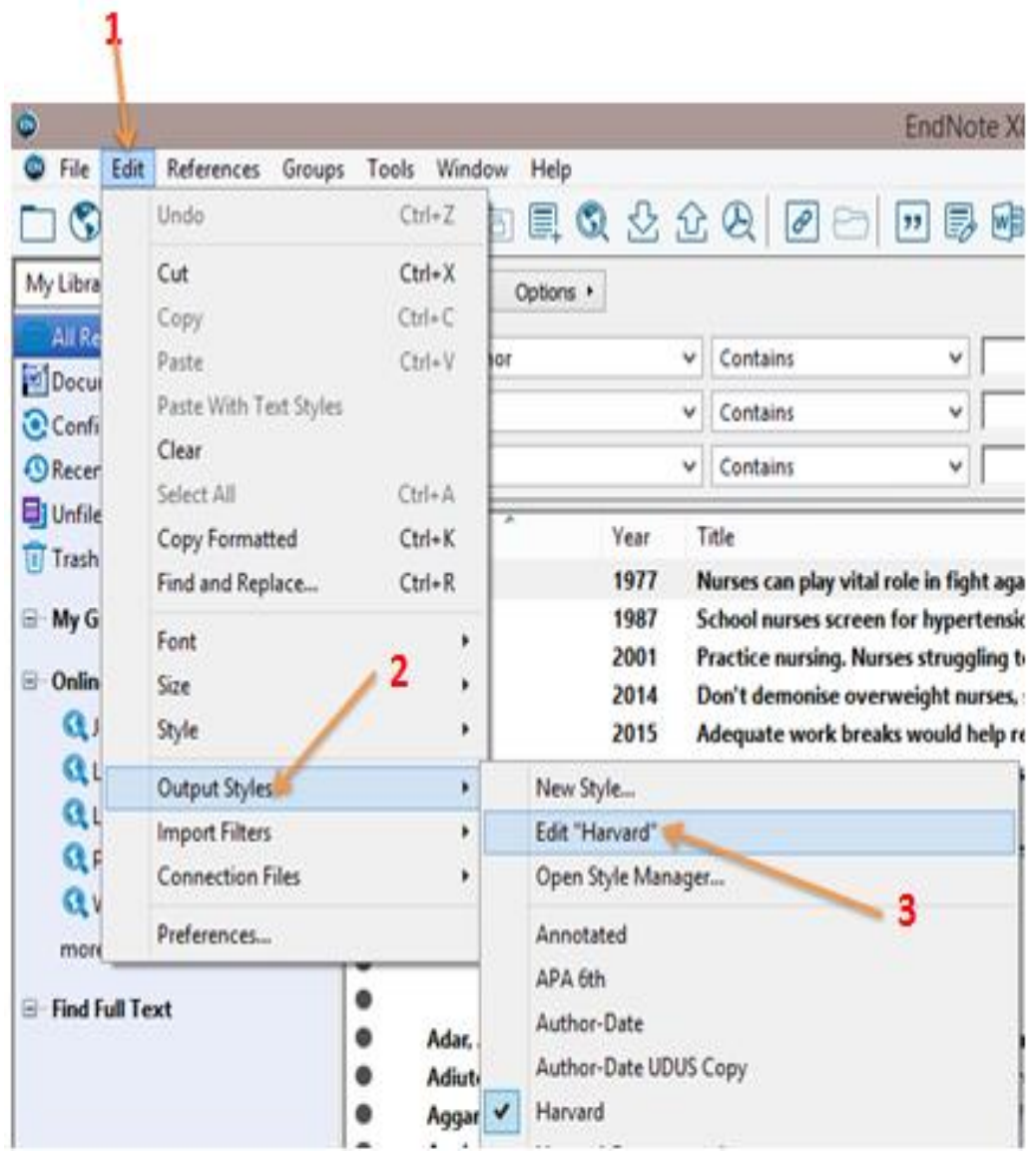
Referencing with EndNote contd.

Formatting the references contd.:
To edit Havard style contd:

- Go to the **Bibliography** group [4], click **Author Name** [5] and then go to the **Name Format** [6]in the menu that appears.

- Use the drop down arrow next to **First Author** box [7] to select the format with First Author's surname without comma [8].

- Use the drop down arrow next to **Other authors** box [9] to select the format with Other authors' surname without comma [10].

- Use the drop down arrow next to **Capitalization** box [11] to select Normal [12].
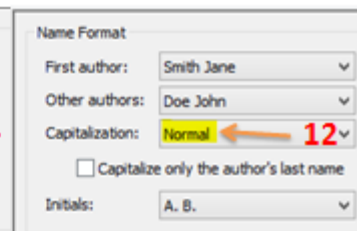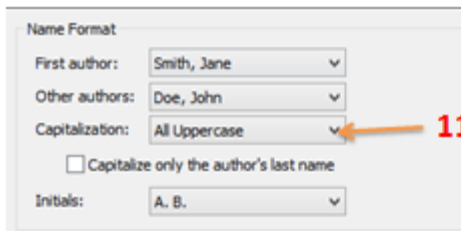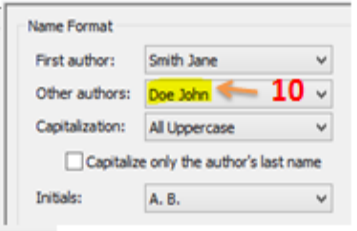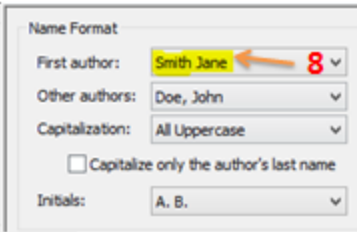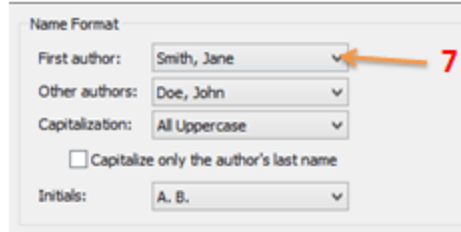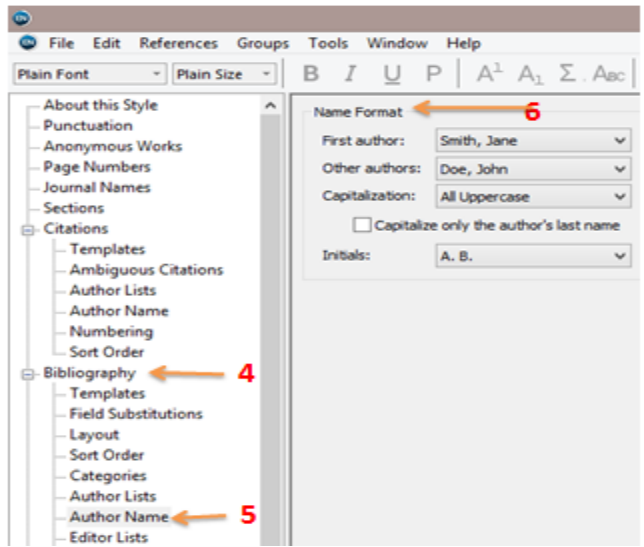
Referencing with EndNote contd.

Formatting the references contd.:
To edit Havard style contd:

- Go back to the **Bibliography** group, and click **Author Lists** [12b].

- Go to **Author Separators** [12c], and delete the **&** signs [12d]in the **before last** boxes.

Referencing with EndNote contd.

Formatting the references contd.:
To edit Havard style contd:
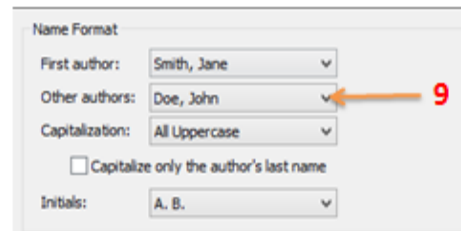
- Use the drop down arrow next to **Initials** box [13] to select the initials format with no full stop after each letter, and no space between the letters [14].

- Go back to the **Bibliography** group and click **Templates** [15].

- In the menu that appears, go to the type of reference concerned (e.g., **Journal Article**) [16].

Referencing with EndNote contd.
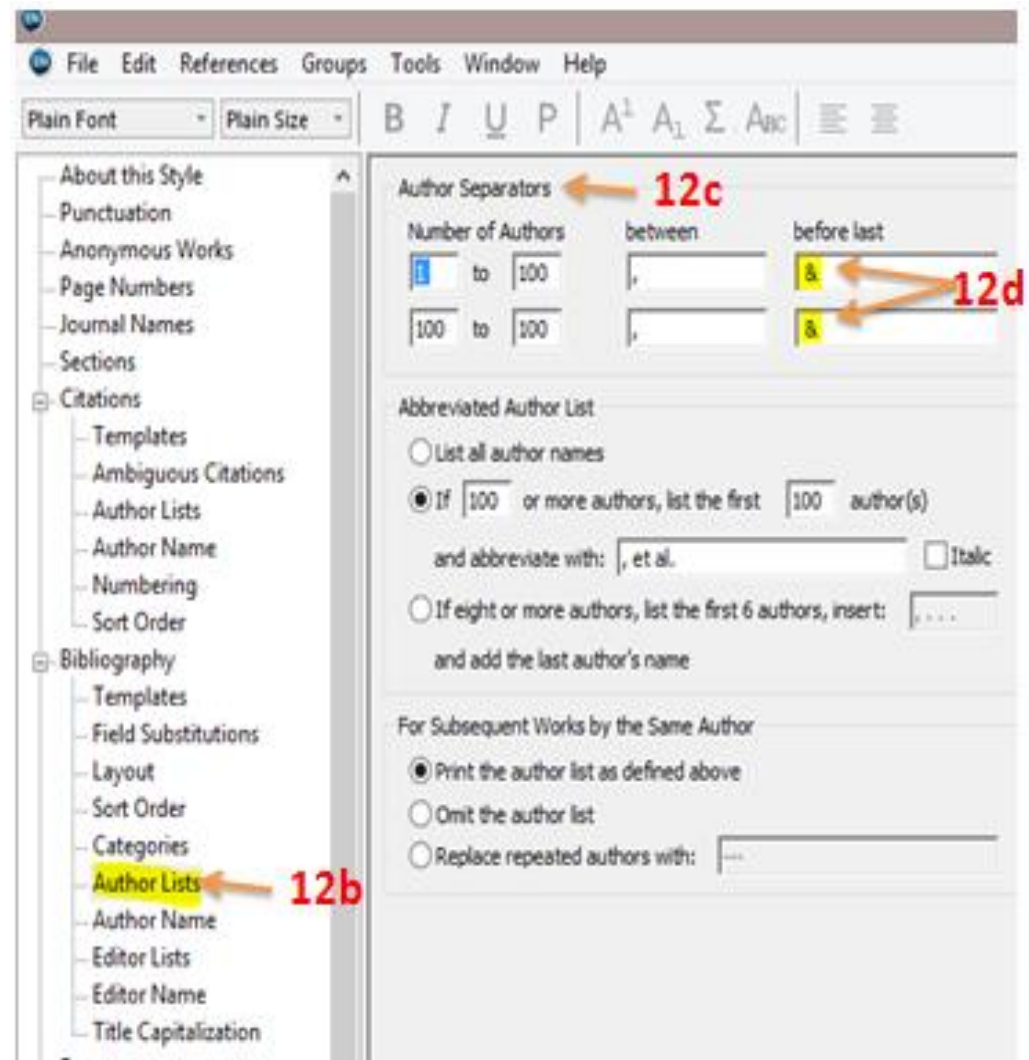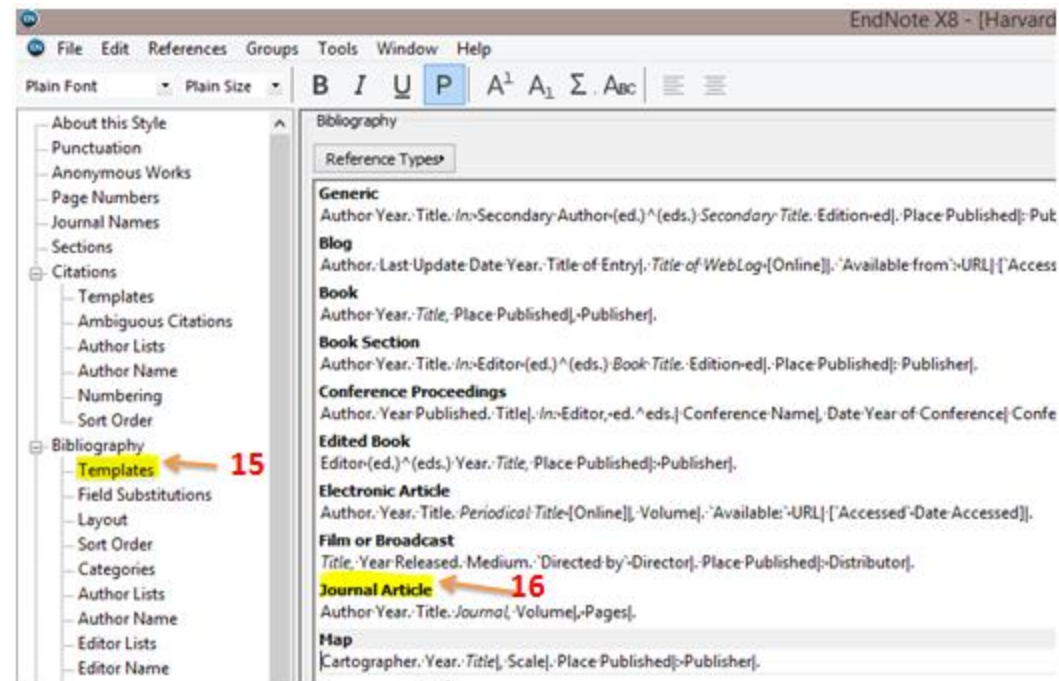## Formatting the references contd.:
To edit Havard style contd:

- Click on **Year**, and enclose it in round brackets [17].

- Change the comma sign after **Journal** to full stop [18].

- Change the comma sign after **Volume** to colon [19].

- Click on the small **x** button to close the view [20].

- Click Yes [21] in the save changes to EndNote style dialog box that appears.

- Give the edited style a name (e.g., **Havard UDUS format** Copy) [22], and then click **Save** [23].

- Finally, select the new style in the Style boxes of your EndNote Library, and document. The referencing style automatically changes to the new style.

Journal Article
Author Year. Title. Journal, Volume, Pages. — 17

Journal Article
Author (Year). Title. Journal, Volume, Pages.

Journal Article
Author Year. Title. Journal, Volume, Pages. — 18

Journal Article
Author (Year). Title. Journal, Volume, Pages.

Journal Article
Author Year. Title. Journal, Volume, Pages. — 19

Journal Article
Author (Year). Title. Journal. Volume, Pages.

EndNote: Save changes to the EndNote style file "Harvard" before closing? — 21
Yes No Cancel
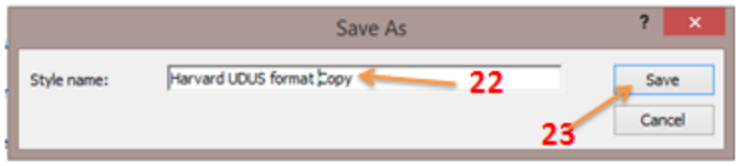
Save As — 22
Style name: Harvard UDUS format Copy
Save — 23
Cancel

Referencing with EndNote contd.

Formatting the references contd.:

- If the reference list is not properly aligned (as shown), it can be edited through the EndNote library.

To edit the reference list through the EndNote Library:

- Open the EndNote library.
- Clic Edit >> Output Styles >> Edit Vancouver.
- In the menu on the left pane, under **Bibliography**, click **Layout** [1].
- Use the drop down arrow next to Hanging Indent to select **All paragraphs** [2].

- Use the small **x** button to close view, select **Yes** in the Save dialog box that appears, give it a name (e.g., **Vancouver Aligned**), and click **Save** (as previously illustrated).

- Finally, select the new style in the style boxes of both the **EndNote Library** and your **document** (as previously illustrated).

REFERENCES

1. Ai-Dharrab SA, Mangoud AM, Mohsen MF. Knowledge, attitude and practice (kap) of primary health care physicians and nurses towards hypertension: a study from dammam, saudi arabia. J Family Community Med. 1996;3(2):57-63.
2. Alanen S, Ijas J, Kaila M, Makela M, Valimaki M. Hypertension guideline implementation: experiences of Finnish primary care nurses. J Eval Clin Pract. 2008;14(5):830-5.
3. Aryal N, Weatherall M, Bhatta YKD, Mann S. Blood pressure and hypertension in people living at high altitude in Nepal. Hypertens Res. 2018.

Referencing with EndNote contd.

Formatting the references contd.:

- If the EndNote library is not accessible, the reference list can still be edited in the document.

To edit the reference list in the document:

- Highlight the whole **reference list** [1] in your MS Word document.

- Right click your mouse and click **Paragraph** [2] in the menu that appears.

- In the **Paragraph** menu box that appears, go to the **Indentation** group, and use the drop down arrow next to **Special** box [3] to find **Hanging** [4], click on it and then click **OK** [5].
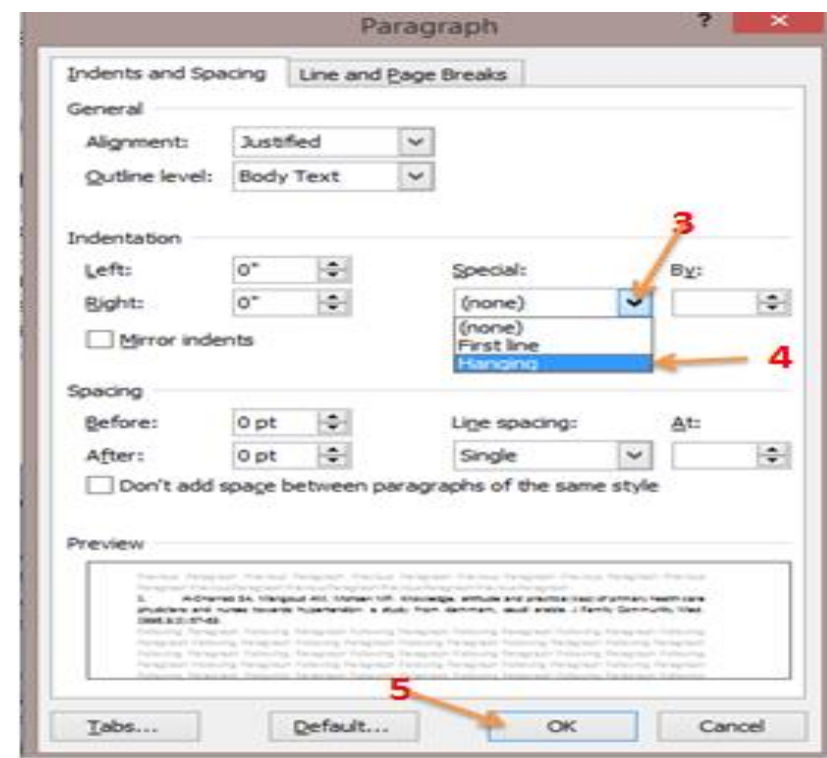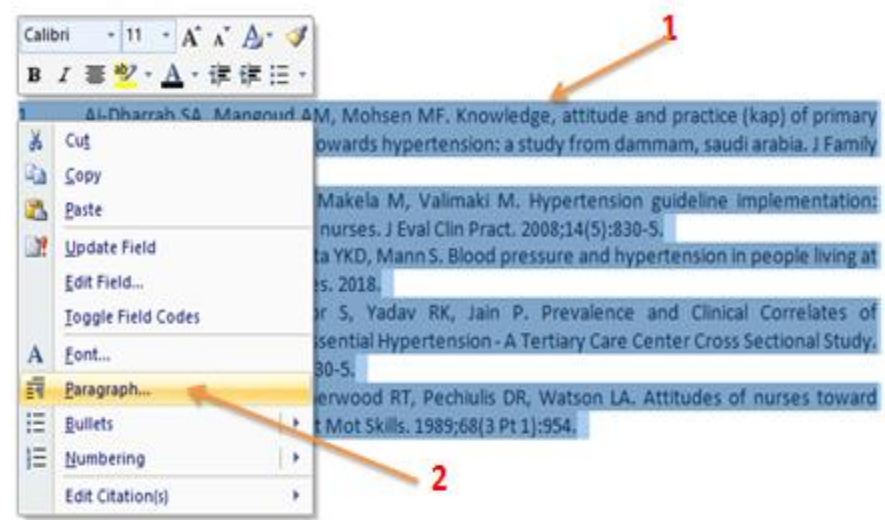
Referencing with EndNote contd.

Formatting the references:
To change the format of Vancouver style:

- Open the EndNote library.
- Clic Edit >> Output Styles >> Edit Vancouver.
- In the menu on the left pane, under **Citations**, click **Templates** [1], and go to (Bibliography-Number) [2].
- The options include:
- If you want to change the in-text citation from round brackets your document (1). to square brackets your document [1]. just change (Bibliography-Number) to [Bibliography-Number]. [3]
- If you want to change the in-text citation from square brackets sitting your document [1]. to square brackets superscripted your document.[1] , highlight [Bibliography-Number] and click on A^1 [4] on top of editing window. Please note that for **brackets sitting**, the in-text citation comes before the full stop, while **superscripted** citations (whether in brackets or open) come after the full stop.
- If you want superscripted open your document.1 just delete the brackets [3b] and click on A^1 [4].
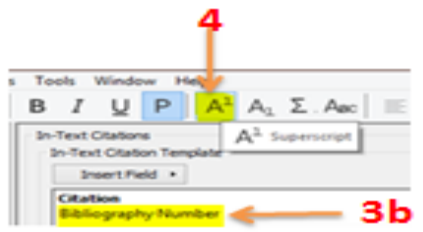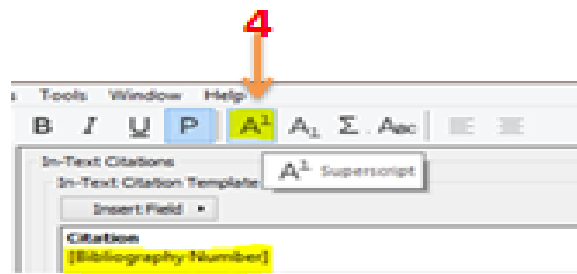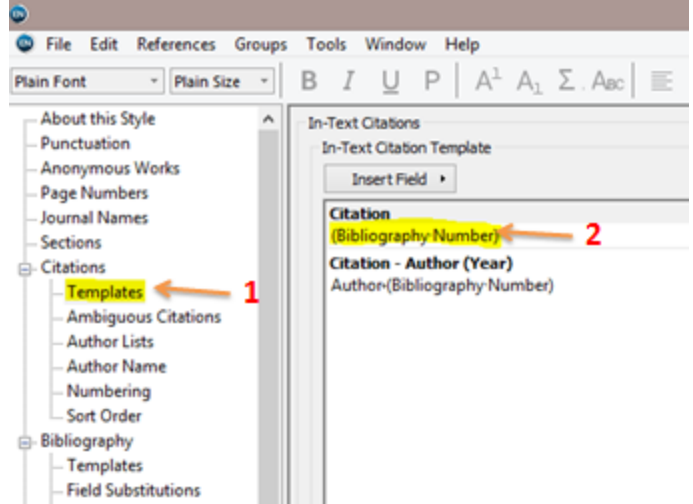- Close the view, name and save the new style (e.g., **Vancouver Superscripted**).

Referencing with EndNote contd.

Formatting the references contd.:

- When the dissertation is completed you may wish to remove the field codes before submitting it (but in the case of a journal article, the field codes should be removed before submitting it).

To remove the field codes:

- Open your document, click the **EndNote** tab [1], go to the **Bibliography** group [2] and click on the drop down arrow next to **Convert Citation and Bibliography** [3].

- In the menu box that appears, click **Convert to Plain Text** [4].

- In the dialog box that appears regarding saving the original document (with field codes) before converting it to plain text, select **YES** [5].

- Retain the original name and location and click **Save**.

- Also save the new version of the document (without field codes) created.
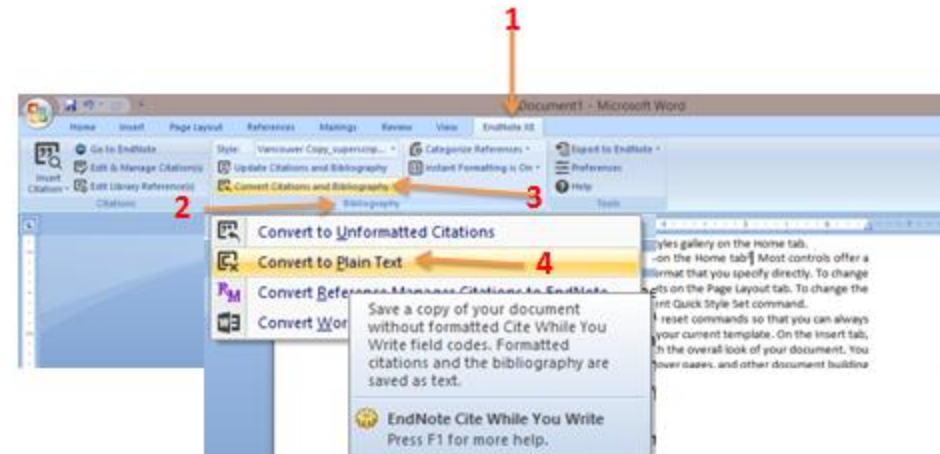
C-International Research Consultancy

Our Services

Design or Review of Protocol / Proposal

We provide technical support in the design of study protocol / proposal. We provide guidance on formulation of research topic, specific objectives, research questions, and research hypothesis. We provide technical support regarding choice of appropriate study design, sample size estimation and sampling technique; as well as choice of appropriate method and instrument of data collection, and data management. We also review protocol / proposal and provide guidance on how to improve the quality in compliance with the guidelines of the institution concerned.

Development of Data Collection Instrument

We provide technical support in the development and validation of data collection instrument. We build questionnaires into the Open Data Kit (ODK) software for data collection with android phones. This saves the cost of printing questionnaires, makes data collection easier, eliminates non-response, enables the researcher to monitor the research assistants recruited for data collection (particularly, when and where each questionnaire was administered, taking pictures of relevant locations, etc), and eliminates the stressful data entry stage that usually follows completion of data collection.

Design of Database, Data Analysis and Interpretation of Results

We provide technical support in the design of database, data entry, data analysis and interpretation of results. However, collecting data with the ODK software (instead of printed questionnaires) removes the need for (and the cost of) designing database and data entry.

Design or Review of Dissertation / Thesis / Project Report

We provide technical support in the design of dissertation / thesis / project report (in compliance with the guidelines of the institution concerned). We provide guidance on data presentation (including creation and formatting of tables and charts). We also review dissertation / thesis / project report and provide guidance on how to improve the quality in compliance with the guidelines of the institution concerned

Manuscript Development

We provide technical support in the development of manuscript (for publication of an article extracted from completed Dissertation, Thesis and Project report).