

Chapter 4: Entering a Reference

In this part of the guided tour you will learn how to:

- ◆ Enter a reference into a library.
- ◆ Attach a figure and other types of files to a reference.

In this part of the tour, you are going to enter a journal article reference that includes attached files.

Open the Sample Library

If EndNote is not already running, start it and open the sample library (Sample_Library.enl), as shown in Part I of the guided tour.

Create a New Reference

There are various ways to add references to an EndNote library:

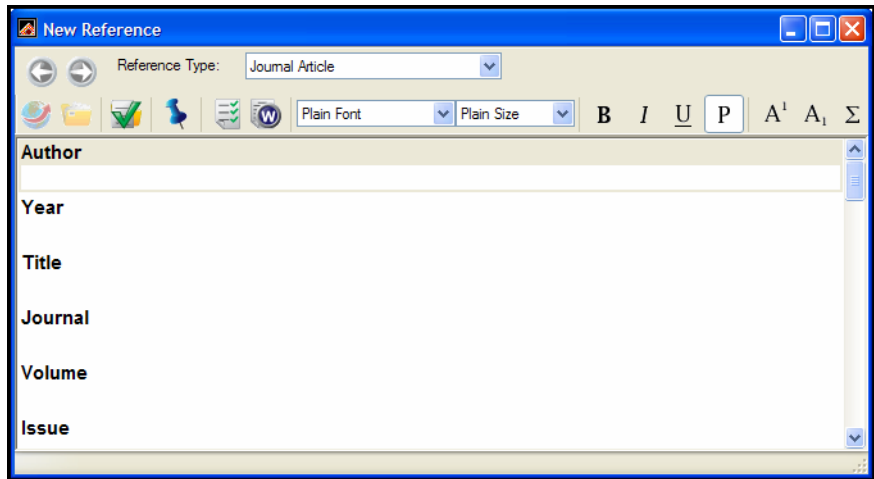
- ◆ Type the reference information into the Reference window.
- ◆ Connect to an online bibliographic database and retrieve the references directly into EndNote, as demonstrated in Chapter 5: “Searching an Online Database.”
- ◆ Import text files of references that have been downloaded from online bibliographic databases, as demonstrated in Chapter 6: “Importing Reference Data into EndNote.”

This example demonstrates how to type reference information into EndNote.

Once a library is open, you can add a new reference to it:

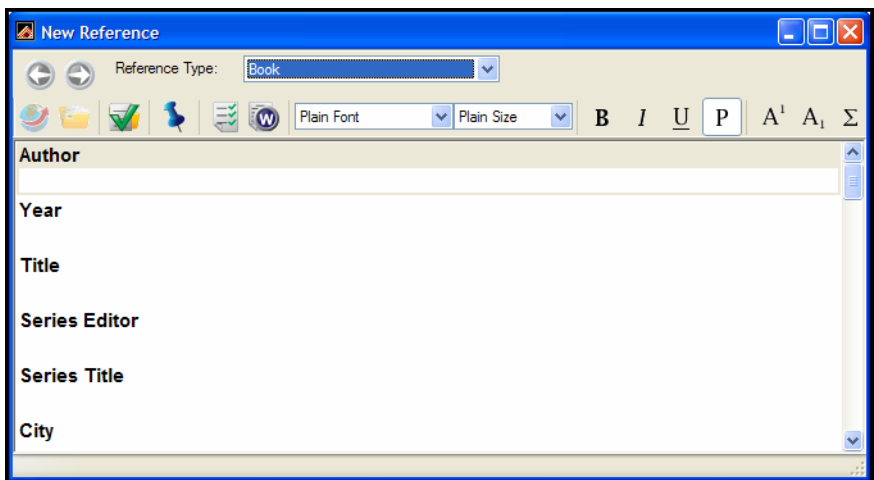
1. Click in the reference list and then, from the *References* menu, choose *New Reference* (CTRL+N). An empty Reference

window opens with the words “New Reference” displayed at the top.



New references appear as journal articles (unless you change the default setting) but can be changed to any other type of reference using the *Reference Type* list at the top of the window.

2. Next, choose a reference type. Click the *Reference Type* list and choose *Book*.



Notice that the field list changes to reflect the type of bibliographic information you would record for a book. You are welcome to select other reference types from the list to see how the list of fields changes for each type of source.

Three reference types—Figure, Chart or Table, and Equation—are available specifically for cataloging picture files and object files, although you can add File Attachments, Figures and Captions to any reference type.

When you are done looking at different reference types, set the reference type back to the *Journal Article* reference type. You are now ready to enter reference information, beginning with the author names.

3. Enter author names for the reference. Individual author names *must* be entered one per line.
 - a. Enter a personal author name with the first name first. With the cursor in the Author field, type:

Tiberius Rex

As you type, EndNote suggests names similar to the one you are entering. This is EndNote's way of using **term lists** to facilitate the process of entering new references.

NOTE: The auto-complete feature can be turned on or off with EndNote Term List preferences. It is available for Author fields when you enter author names with the last name first.

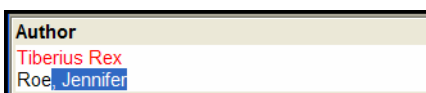
The name you are entering, Tiberius Rex, is a new author in this library, so keep typing until you complete the name and then press the ENTER key.

The name appears in red text to indicate that it is a new name in the Author term list for this library. When you close the reference, it will be added to the Author term list and the red text will change to black. You can read more about term lists (and how to turn these options on or off) in Chapter 10 of the full EndNote.PDF manual.

- b. Enter the second author's name, but with the surname first:

Roe, Jennifer

This author is already in the sample library, so as you start typing the last name, you will see EndNote complete the name for you.



Press ENTER to accept EndNote's suggested author name.

- c. For the third author, enter:
de Young, John Robert, Jr.

The first comma separates the last and first name. The second comma is inserted before suffix text, to make it clear that it is not part of the author's name for manipulation of name order or stripping to initials. Suffix text will always print after the other information for this author.

- d. Enter the fourth author's name, which in this case is a corporate author:

University of California,, Berkeley

Corporate author names are entered with a following comma, so they will not be manipulated like personal author names. In this case, the corporate author name has a comma within the name. We inserted two commas to allow for correct formatting. The first comma makes it clear that text up to that point should not be manipulated, and the second comma indicates that there is no "first name," yet includes suffix text.

4. Press TAB to accept the author name and move to the Year field. In the Year field, type:

2006

5. Continue entering the reference as shown below, using the TAB key to move to the next field, and SHIFT+TAB to move to the previous field, if necessary. You can also use the mouse to click in the desired field. If information is not provided for a particular field, leave that field empty.

Title: The scale and the feather: A suggested evolution

Journal: Paleontology

Volume: 3

Issue: 1

Pages: 125-128

Date: November 22

Keywords: Feathers
Evolution
Birds

No extra punctuation (such as parentheses around the year) or text styles (such as bold or italic) are entered into the reference. EndNote adds the necessary punctuation and text style changes to the references when it creates a bibliography.

While we are not entering any text into the Abstract or Notes fields, you could enter 64 K into each of these fields, which amounts to 10-12 pages text.

6. Next, attach a PDF file to the reference. You can attach just about any type of file to the File Attachments field of a reference.

Scroll to the File Attachments field, and from the *References* menu, select *File Attachments* and then *Attach File* to display a file dialog. On the file dialog:

- a. Navigate to the folder Program Files\EndNote X2.
- b. Notice the check box titled "Copy this file to the default file attachment folder and create a relative link." Make sure this box is selected so that EndNote will make a copy of the file to store with the library. That way, the attached file is always available to you, even when you move the library.
- c. Highlight the file titled EndNote.PDF. This is the full EndNote manual located in the EndNote program folder.
- d. Click *Open* to insert the file into the File Attachments field. A file icon will appear in the field.



You can attach up to 45 different files to a single reference, and you can double click a file icon to open the file with the default application.

7. Next, attach a figure file. Attached figures can be cited and displayed in Microsoft Word, which we will do later in the tour. You can attach a single figure file to each EndNote reference.

Microsoft Word recognizes many file types as figures. Some valid file types include these graphic files:

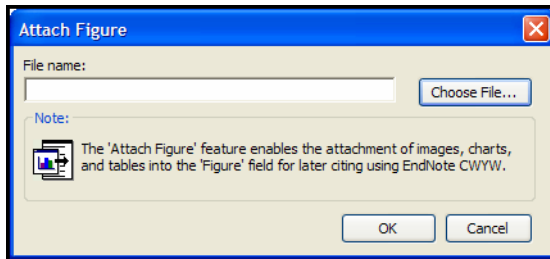
- ◆ Windows Bitmap (BMP)
- ◆ Graphics Interchange Format (GIF)
- ◆ JPEG File Interchange Format (JPEG)
- ◆ Portable Network Graphics (PNG)
- ◆ Tag Image File Format (TIFF)

You can also insert object files, such as:

- ◆ Audio files (WAV, MP3)
- ◆ Microsoft Access files

- ◆ Microsoft Excel files
- ◆ Microsoft Power Point files
- ◆ Microsoft Project files
- ◆ Microsoft Visio files
- ◆ Microsoft Word files
- ◆ Multimedia files (MOV, QuickTime)
- ◆ Technical drawing files
- ◆ Text files (TXT, RTF, HTML)

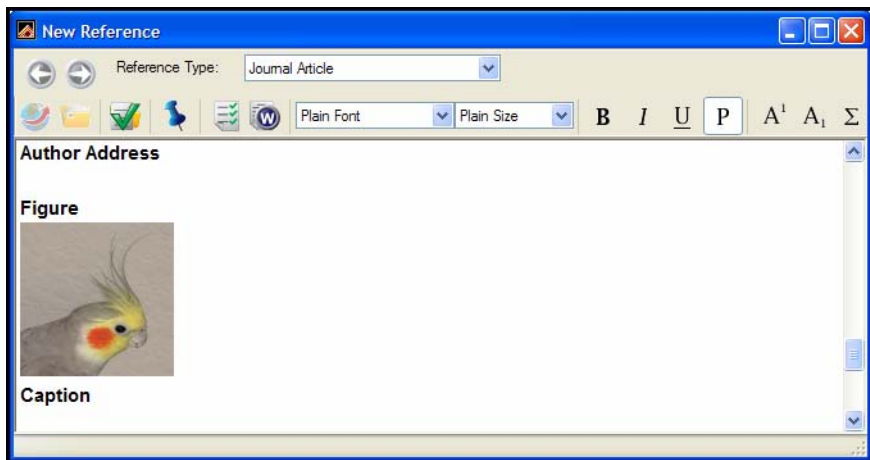
Scroll to the Figure and Caption fields, and from the *References* menu, select *Figure* and then *Attach Figure*.



Click *Choose File* to display a file dialog.

On the file dialog:

- a. Navigate to the folder: Program Files\EndNote X2\Examples. (The Examples folder found here is a shortcut to a shared location.)
- b. Highlight the file titled Feather2.BMP.
- c. Click *Open* to insert the file into the Figure field.



The graphic appears as a thumbnail in the reference. EndNote copied the file to a .DATA folder stored with the Sample_Library library, and linked the copied graphic to this reference.

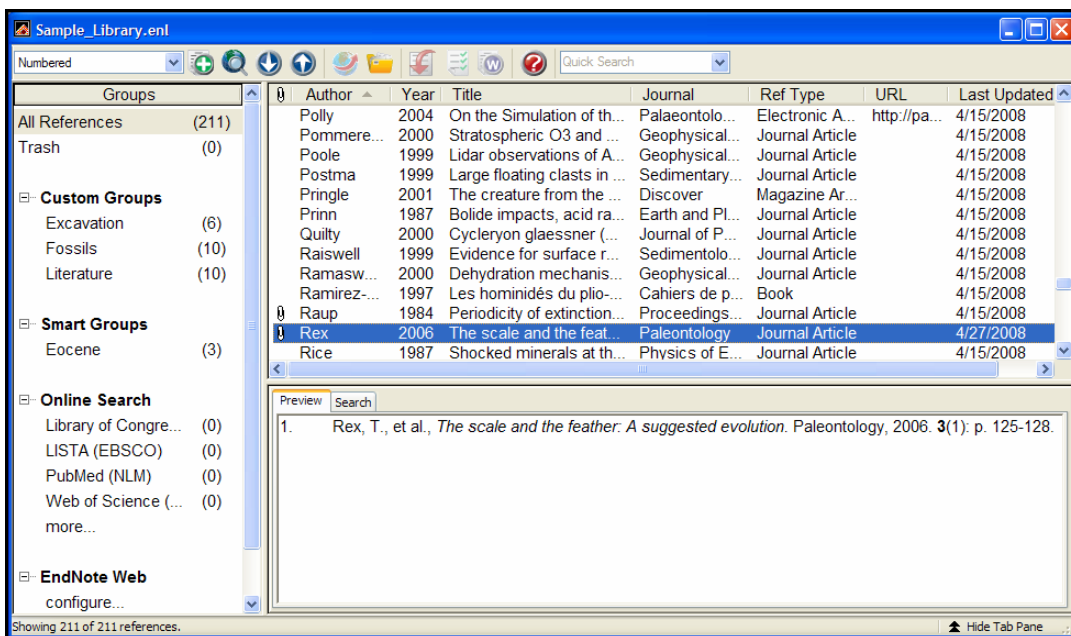
In the Caption field, enter:

Cockatiel Crest Feathering

Always enter a caption for your image. It assists in locating images, and it labels figures in your Microsoft Word documents.

8. Close the Reference window by clicking the close box (the X in the upper right corner of the Reference window), or by choosing *Close Reference* (CTRL+W) from the *File* menu.

All information is automatically saved when you close the reference window. Your new reference will appear in the Library window.



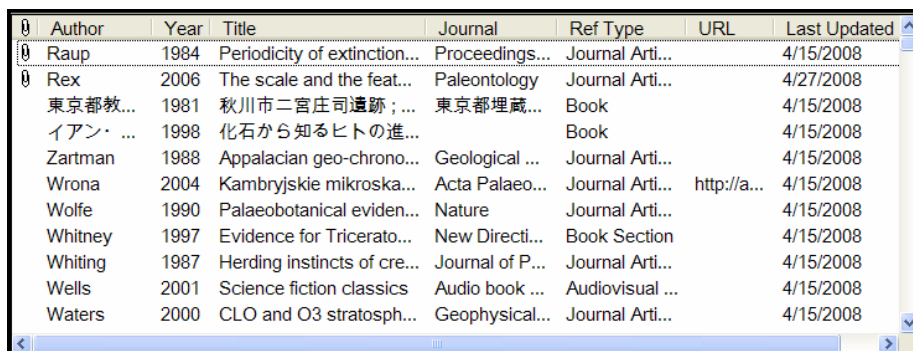
A paper clip icon appears next to the reference to indicate an attached file. You could also modify the reference list to show a column for attached figures, but that is not a default setting.

Locate References That Contain Attached Files

You can easily locate those references that contain attached files.

To locate the references containing attached files:

Click the paper clip icon in the first column heading twice to sort records containing attached files at the top of the list. References that include a paper clip have one or more attached files.



Author	Year	Title	Journal	Ref Type	URL	Last Updated
Raup	1984	Periodicity of extinction...	Proceedings...	Journal Arti...		4/15/2008
Rex	2006	The scale and the feat...	Paleontology	Journal Arti...		4/27/2008
東京都教...	1981	秋川市二宮庄司遺跡; ...	東京都埋蔵...	Book		4/15/2008
イアン・ ...	1998	化石から知るヒトの進...		Book		4/15/2008
Zartman	1988	Appalacian geo-chrono...	Geological ...	Journal Arti...		4/15/2008
Wrona	2004	Kambryjskie mikroska...	Acta Palaeo...	Journal Arti...	http://a...	4/15/2008
Wolfe	1990	Palaeobotanical eviden...	Nature	Journal Arti...		4/15/2008
Whitney	1997	Evidence for Tricerato...	New Directi...	Book Section		4/15/2008
Whiting	1987	Herding instincts of cre...	Journal of P...	Journal Arti...		4/15/2008
Wells	2001	Science fiction classics	Audio book ...	Audiovisual ...		4/15/2008
Waters	2000	CLO and O3 stratosph...	Geophysical...	Journal Arti...		4/15/2008

You can double-click on an individual reference if you would like to view the complete reference. When you are done viewing a reference, click the close button to close it.

Click the Author column heading to again order the list by author names in ascending (A to Z) order.

This concludes Chapter 4 of the guided tour. Chapter 5 demonstrates how to search remote databases and save your search results to an EndNote library. If you do not have an Internet connection, skip Chapter 5 and move on to Chapter 6: "Importing Reference Data into EndNote" on page 57.

If you are finished working with EndNote for now, go to the *File* menu and choose *Exit* to close the EndNote program.

Related Sections in the Full Manual

See these sections in the full EndNote.PDF manual for information related to this portion of the tour:

- ◆ If you are eager to begin creating your own library, see Chapter 4, "The EndNote Library."
- ◆ Chapter 5, "Entering and Editing References," provides more detail about typing references into your library and inserting images.