How to use EndNote software

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Abstract:

Sources and references are one of the important elements and, in our opinion, it is the most sensitive subject for the start of a research project. In our study, we will approach how to apply one of the technological means adopted in the management of references, by identifying certain gaps in which the researcher should not fall. Especially in the quotation process. We choose to present Endnote, a bibliographic management software, which allows to create a personal bank for to maintain bibliographic references. One of the objectives of the study is to train researchers in the technology, as well as to point out some common errors in scientific research on the platform of Algerian scientific journals. We wonder how to use this bibliographic management software. What are the different steps to create a library, enter references or even create new styles?

Keywords: *Endnote, bibliography, management, quotation, documentation.*

I. INTRODUCTION

In order to give research an academic quality, it is necessary to be able and to control the marginalization and documentation aspect of the research. At least to escape the suspicion of scientific plagiarism. Therefore, the reference list has become an indispensable means for the researcher to rely on, as well as the methods of quotation and marginalization. Therefore, it is necessary to carefully examine, to be honest and truthful in the documentation of scientific research, in order to avoid interpretation, fabrication, exaggeration, falsehood and lack of credit.

EndNote is like any other program interested in recording references of all kinds. And because it's simple to use and easy to download, we chose it for these reasons. It is considered to be one of the programs that automatically detects searching the web, finding an article on a specific website, or a copy of a book from an electronic library, and it may be covered by this program and others. Endnote also helps organize the search the way we want it to. It also allows you to sort items into groups and tag them with keywords. Or create safe searches that automatically populate related topics.

It allows us to create bibliographic references for any text editor, and it can be downloaded directly into Word. With support for over 9000 quote styles, it allows us to coordinate the matching and uploading of any directory or publication.

Optionally synchronize data, while preserving the researcher's notes, files and bibliographic records. It also allows you to access search from any web browser.

It is really a medium that informs us of all ends. Through this formative intervention, we will try to present the most important points to do to facilitate the use of the program for each student and researcher. Before that, we are introduced to some systematic concepts and writings that must be taken into account in the quotation and marginalization processes, because the package is not responsible for it and therefore the researcher must know it.

We wonder how to use Endnote management software. What are the different steps to create a library, enter references or even create new styles?

1. Documentation

Data collection is carried out through careful research of facts in references and sources, with the aim of theoretically constructing the subject. (Van Peer *et al.*, 2012)

The importance of the service provided by the selection process (referrals), which in some cases can be essential to the success of the research, should not be underestimated.

Bibliography has become a new method for professional researchers to search for information. Or rather, it has become one of the outlets for (legalized) scientific theft on which some rely. To such an extent lies the importance of references and sources. (Elsevier, 2020)

As for the methods of writing references, they are called bibliographic models, which differ according to the subjects and disciplines. It is not necessary to explain the order of the elements of any reference, as long as the methodology of marginalizing and writing references is a means and has not become an end. (Lee, 2018; Penders, 2018)

Perhaps among the dominant examples, we find the software "EndNote", knowing that these electronic supports by means of which one avoids making errors of any kind, and the advantage of easily changing the model of writing the reference into one. wink, and we can retrieve items from an article, a book, or any other document that was online. Just by pushing a button.

2. Quotation

Quotation is a necessary process in academic research. (Arsyad *et al.*, 2018) The researcher looks for information in various references (books, letters, articles, etc.), and this quotation is due to additions, criticisms, or even analyzes and exchanges of views. The quote can also be a text or a meaning.

It does not give good research to a large number of quotations as it cannot be longer than a third of the page, and in graduate theses it is advisable not to exceed a three page sentence overall. of the thesis, so as not to take on the character of scientific plagiarism.

Thus, the control of research data contributes to the credibility of research results,

the accuracy of procedures and their quality. And if it is electronic data, its security is essential in its choice. The quotations may vary according to the journals: insertion of pages, Author-Date model, etc.

2.1. Entire quotation

In this type of quote, you write an entire paragraph without compromising it, and you write in parentheses without prejudice to its vocabulary. In addition to referring to the author of the paragraph, it can be in the context of the conversation.

For example, for Stangor (2014) "Social psychology is the study of the dynamic relationship between individuals and the people around them". The author of the paragraph can be implicitly designated (internal) and come in the form of (editor, year), like the APA form. For example: "Social psychology is the study of the dynamic relationship between individuals and the people around them". (Stangor, 2014)

2.2. Partial quotation

In this type of quotation, the researcher resorts to writing part of a paragraph. This part may affect an addition or a decrease in the quotation of the researcher paragraph. Note that the increase or decrease is written between two walls in the quoted paragraph, and it is the same in parentheses.

In the case of augmentation, for example: according to Stangor (2014): "Social psychology is the study of the dynamic relationship between individuals and the people around them [including the family]".

In the case of decreases, such as: "[...] psychology [...] study of the dynamic relationship […]". (Stangor, 2014)

And the Scientific Secretariat imposes its adoption, which is sought by any researcher in various disciplines, we can skip the paragraph with its errors without deleting it. For example: Quoted under the authority of a learned philosopher (Fanois, 2000): "Psychology is technical" [sic].

The sign *sic* expresses the transcription of a paragraph with a spelling, grammar, expression or other error as found in the original text. We often use such quotes to deepen opinions and analytical studies, which rely on content analysis, or in which newspapers and dailies publish information. This sign confirms the intention of the transmission, not the existence of the error coming from the seeker.

II.   Most frequent referrals' types

Table (1): frequent referrals' types

Book
Conference paper
Conference proceeding
Dictionary
Document
Electronic article
Electronic book
Encyclopedia
Journal article
Magazine article
Manuscript
Newspaper article
Personal communication
Section book
Thesis
Unpublished work
Web page

III.   Materials

1.   Retrieve the Reference List File

Downloading bibliographic forms is very important, on the one hand to perhaps update some forms, and on the other hand to add others that are not included in the program.

Another advantage of the program is that it allows us to save the list of references to an extension file such as .ris or .enw.

2.   Presentation of Endnote software

EndNote is bibliographic management software which allows to create a personal bank for to maintain bibliographic references of publications and to automatically generate lists of references and bibliographies in Word or PowerPoint. It's only available in English. (Bibliothèque Polytechnique Montréal, 2020)

Endnote offers several advantages: free for students, professors and researchers; many predefined styles; access to the full text through the "Open URL" link; data exchange; possibility of storing one's bibliography. It is available for download from: https://support.clarivate.com/Endnote/s/article/EndNote-Installer-download?language=en_US.

3.   Create a library

Once the software is installed, click on the icon then on "Create a new library", or click on "File" and select "New". Choose where to register the bank and give it a name. (Bibliothèque Polytechnique Montréal, 2020)

4.   Enter reference
4.1. Manually

Inserting references into Endnote takes time and takes a lot of effort. But it is essential work.

To enter references manually click on "New reference" (keyboard shortcut Ctrl + N). Then, choose the "Reference Type": journal article, book, book section, web page, etc.

Insert an author's name per line: Last name, First name or First name, Last name (use the same model for all references). Fill in the different fields as needed and insert documents (PDF files) by dragging them. It's possible to put words in italics, in bold or even capitalize.

When it's finish click on the cross to save and close. The reference will be inserted automatically.

4.2. Import references

On some sites, it is possible to directly import the associated data as an Endnote quotation.

4.2.1   From Cairn[1]

Make a research, choose and click on the reference. Then, click on "Quote or export" at the top right of the screen. At the bottom of the page click on "EndNote (.enw)". Give a name to the file and click on "Save".

4.2.2   From Google Scholar[2]

Make a research, choose the reference and click on located just below the reference. Then, click on "Endnote". Give a name to the file and click on "Save".

4.2.3   From Science Direct[3]

Make a research, choose and click on the reference. Then, click on "Cite" and on "Export Quotations to RIS". Give a name to the file and click on "Save".

4.2.4   From Scopus[4]

Make a research, choose and click on the reference. Then, click on "Export". Choose "RIS Format" and check / uncheck the information you want exported. Then click on "Export" at the bottom of the page. Give a name to the file and click on "Save".

4.2.5   From a PDF file

This is a technique that the researcher adopts, especially in the case of a large number of files (PDF) that are not included in its approved reference list, and the researcher wishes to put it in the program.

On Endnote, click on "File", "Import", "File". Fill in as below. Here discard duplicates means that we want to avoid duplicate files. Choose the file and click on "Import".
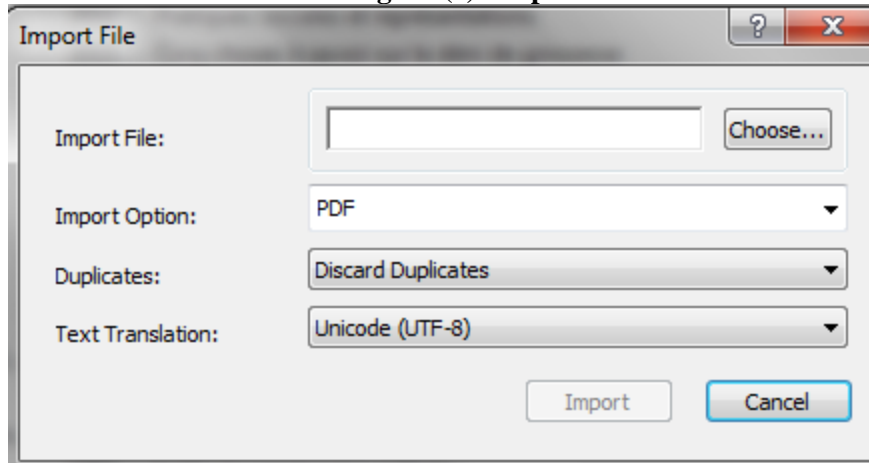
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[1] https://www.cairn.info/

[2] https://scholar.google.com/

[3] https://www.sciencedirect.com/

[4] https://www.scopus.com/search/form.uri?zone=TopNavBar&origin=searchbasic&display=basic

Figure (1): Import PDF

5. Recover downloaded data

There are two possibilities to recover the downloaded data. Either click directly on the file name. Or, from Endnote, click on "File", "Import" and "File" choose the corresponding file.

Whether it is a RIS file or not, the data will automatically be inserted under an "Imported Reference" folder. All you have to do is verify the information. If this does not work, you will have to fill in the various fields manually.

6. Add a style

For adding a style, you can go to the site: https://endnote.com/downloads/styles/ and search the journal. If it does not exist, it will have to be created manually. To do this, under Endnote click on "Edit" then on "Output Styles". There are two possibilities.

6.1. Click on "new style"

In this first case, you have to fill everything according to your needs and do not forget anything.

6.2. Click on "edit "APA 6"" (or another style which comes as close as possible to the recommendations of the journal)

Here fields are already filled, just modify as needed.

7. Style creation

For this example, we used the second method where everything is already filled. You just have to modify it by following the recommendations for the authors.

7.1. About this style

This is a presentation of the style. You can only fill in the fields "based on" (APA, Vancouver), "category" (psychology, sociology, medicine) and make comments.

8. Punctuation

There are two types of punctuation: English or French. It is a question of adjusting the punctuation with or without spaces (; ? ! :).

9. Anonymous works

To be completed if there are works of which the author(s) are unknown.

10. Page Numbers

Setting the page number format for journals.

11.   Journal name

You can choose to abbreviate or not the journal name.

12.   Section

This option allows you to create multiple bibliographies. This option can be useful for a book or a thesis.

13.   Quotations

It is from this stage that modifications may be necessary according to the recommendations.

13.1. Templates

There are two types of quotations: (Author, date, possible page) and Author (date, possible page). Attention in case of modification: It is necessary to remember to modify the two cases.

When you click on "Insert Field" you can add other fields if necessary.

13.2. Ambiguous quotation

This is useful when an author has written several texts in the same year[5], or if several authors have the same last name but not the same first name[6], or if two authors have the same first and last name[7].

13.3. Author List

Separation between the different authors.

13.4. Author name

Name format of the authors. Several possibilities: First name Last name or Last name First name with or without comma. Capitalization: As Is, Normal or Uppercase. Initials: Last Name Only or Full Name. Make the same change for First and Other Authors.

13.5. Numbering

Format of consecutive quotations.

13.6. Sort order

Quotation sort order.

14.   Bibliography
14.1. Templates

Here you find the different types of references. It is a question here of filling in the various fields according to the recommendations of the journal.

Under the "Reference Types" tab we find all types of references: article, book, chapter, etc.

Under the "Insert Field" tab we find the author, date, title, number, etc. Follow the model provided by the journal.

14.2. Field substitutions

If some field are missing.

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[5] Like Sigmund Freud.

[6] Sigmund Freud and Anna Freud.

[7] Alexandre Dumas father and Alexandre Dumas son.

14.3. Layout
Start or end each reference with some words.

14.4. Sort order
Bibliography sort order.

14.5. Categories
This is useful if you want to group the works according to a specific category. Example: all articles, all books, all web pages.

14.6. Author List and Editor List[8]
Authors and Editors separators and abbreviations. For example, some journals use "and" instead of "&" in the bibliography.

14.7. Author Name and Editor Name[9]
Name format. Lower case, Upper case, Full name, etc. The quotation can be in lowercase and the bibliography in uppercase.

14.8. Title capitalization
You can capitalize or not some elements of the title.

15.   Footnotes
Some journals use footnotes as a bibliography. In this case choose the option as below.

Figure (1): Footnotes

Check or uncheck "Include quotations in bibliography" as appropriate. There are two types of boxes to fill in. Example: Generic[10] and Generic - Short form[11].

As for the bibliography, you must fill in according to what you need according to the model of the journal "Reference Types" (article, book, etc.) and "Insert Field" (author, date, title, journal, pages, etc.).

Some tabs (Templates, Field Substitution, List, Name and Capitalization) are the same of bibliography. There is only "repeat quotation" which is new. It's mean when same quotation (author, date, reference type) follows each other.

16.   Figures & Tables

16.1. Figures and Tables
Placement of Figures and tables.

16.2. Separation & punctuation

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[8] The editor list is mainly used when there are several authors of a book.

[9] The editor name mainly concerns book chapters or sub-direction books.

[10] First occurrence of the citation.

[11] Other occurrences of the citation.

Separation and punctuation of image.

Once you have finished, remember to save by clicking on "File" then "Save as", remove the term "Copy" and give the style a name.

Then, go to "Edit" "Output Styles" and on "Open Style Manager". You can do a quick search by typing the first letters of the style. Example: type Van for Vancouver. Then you just have to tick off the corresponding box. It is just for make it visible in Word.

IV.   On Word

Go to Endnote tab. Click on "Insert Quotation". Enter the author's name or the title of the book and click on "Find".

When you click on the desired work, you will see at the bottom the different characteristics of this entry: the type of reference, the registration number, the author, etc.

From there two possibilities: either we click directly on "Insert" and we obtain the format (Author, date); either we click on the drop-down list and we obtain a set of choices.

Table (2): Insert Quotation

Choice	Example
Insert	(Piaget, 1947)
Insert & Display as Author (Year)	Piaget (1947)
Insert & Exclude Author	(1947)
Insert & Exclude Year	(Piaget)
Insert in Bibliography only[12]	

Then, click on "Edit & Manager Quotation(s)"[13]

There are two parts: The quotes at the top and "Edit Quotation" at the bottom

If you have made a mistake, you can click on "Edit Reference": it is possible to Insert or Remove one or more references.

In "Edit Quotation": This is where we will put the page numbers as well as the things to add before or after the quotation (for example "quoted by"). It is possible to change the format of the reference by clicking on "Default".

Table (3): Edit & manage Quotation(s)

Choice	Example
Default	(Piaget, 1947, p. 47)
Display as Author (Year)	Piaget (1947, p. 47)
Exclude Author	(1947, p. 7)
Exclude Year	(Piaget, p. 47)
Exclude Author & Year[14]	(p. 47)
Show in Bibliography only[15]	

Under "Reference" we find the characteristics of this entry. Click on "OK".

By clicking on the "Style" drop-down list, it is possible to choose the style suited to the magazine: APA, Vancouver, etc. This is also where we will find the styles that we have personalized.

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[12] The reference is present in the final bibliography.

[13] Be careful, you have to go back a little with the right-left arrows on the keyboard so as not to be sent back to the first reference.

[14] The reference is present in the final bibliography.

[15] The reference is present in the final bibliography.

V.   Conclusion:

Scientific research takes time and requires paying attention to the elements mentioned. Endnote bibliography management software saves some time by making bibliography management easier.

-    **Referrals and references:**

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