

# ENDNOTE & REFERENCING

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[These notes, and a small collection of local Endnote connection files mentioned in 4.h below, are available for download from the resources page of [www.rosslangmead.com](http://www.rosslangmead.com).]

## A. ENDNOTE

### 1. WHAT IS IT?

*Endnote* is reference management software, available for both PC and Mac.

You enter details of references (such as author, title or date) in database fields and it spits them out in various formats to comply with different styles of citation, creating a bibliography automatically. You can organise all your references with *Endnote*, store your notes, attach documents, insert footnotes in your papers, create bibliographies, search online library catalogues and databases, and keep track of all your reading. *Endnote* is a powerful and customisable tool for researchers.

Reference management software is a must for postgraduate students and academics these days, in order to be productive, organised and consistent in referencing.

There are many others on the market. A thorough comparison of their features is available on Wikipedia under 'reference management software'.

I'm introducing *Endnote* because the MCD University of Divinity has a license for its research students to use *Endnote* (it is currently distributing version X5). You borrow a CD from your college library and install it on your computer.

Others can buy it at \$339, or \$199 for full-time students (see the Australian distributors, [www.crandon.com.au](http://www.crandon.com.au)).

### 2. WHAT CAN IT DO?

#### a. Store bibliographic details

It can store details of a reference of any type, e.g., article, book, chapter, thesis, audio-visual, map, web page.

**b. Store notes**

You can enter up to about 5000 words per reference in the 'Abstract' or 'Notes' field, plenty for notes on most books or articles. Later you can search your notes for words or phrases.

**c. Select lists using indexes**

You can enter key words as indexing words, and easily extract all references with those key words. The search engine is quite powerful and flexible, which is necessary when you eventually get a large library of references.

**d. Format references in whatever style you need**

In the Chicago style used by the MCD, for example, footnotes look like this:

Dietrich Bonhoeffer, *The cost of discipleship* (London: SCM, 1959).

In the Chicago style, references in your bibliography will look like this:

Bonhoeffer, Dietrich. *The cost of discipleship*. London: SCM, 1959.

I recommend you choose the 'Turabian' or 'Chicago 15thA' style.

You can define new styles or modify existing ones.

**e. Search online catalogues and databases**

There are files called 'filters' and 'connections' which enable *Endnote* to get details of references from collections such as the Library of Congress or the ATLA Religion Database, and most major university library catalogues. It saves typing out the details. (See 4.h below)

**3. SOME EXAMPLES (to be demonstrated in the seminar)**

a. Entering a reference. Fill in the fields, using little punctuation and plain font.

b. Choosing a format. From the Style bar (top left). You can see the formatted reference in the Preview pane.

c. Entering a footnote in your thesis. Repeated citations can be automatically abbreviated if you choose.

e.g., First footnote: Kate L Turabian et al, *A manual for writers of research papers, theses, and dissertations: Chicago style for students and researchers*, 7th ed. (Chicago: University of Chicago Press, 2007).

Second footnote: Turabian et al, *A manual for writers*, 45.

- d. Using the author-date method.
- f. A bibliography is automatically created, matching the citations.
- g. Indexing references. Enter key words with each reference and then you can search for references that contain them.
- h. Viewing and annotating PDFs within *Endnote*. You can attach a PDF to reference. Then you can view it, highlight bits of it and annotate it within in Endnote. Your highlights and comments are searchable.

#### 4. GETTING A LIBRARY GOING

[This section is for reference and won't be covered during this seminar]

The hardest part about *Endnote* is getting going. Here are some basic instructions, but feel free to consult me if you have troubles.

##### a. Start a library

Go to File/New. Give it a name and save it to somewhere amongst your documents, not your applications—this is so that it gets backed up more often.

##### b. Make sure this library opens automatically

Go to Preferences/Libraries. Select 'Add Open Libraries'.

##### c. Choose which fields to display

Go to Preference/Display Fields. The usual is to display at least Author/Date/Title.

##### d. Set the folder locations

Three folders come with *Endnote*, holding the Styles, Connections and Filters. Go to Preferences/Folder Locations and nominate where they are to be found. Endnote needs to be pointed in their direction.

##### e. Choose a style to use

Go either to the Style bar (top left) (or to the menu Edit/Output Styles) and choose a style. MCD students will use either Chicago 15thA, which matches the 15th edition of the Chicago Style Manual, or Turabian (I can't see any differences).

(If there are no styles to choose from, go to Edit/Output Styles/Open Style Manager and mark some of those you might use. Close the Style Manager and try again.)

**f. Open the preview pane**

Click on 'Show Preview' at the bottom right of the library window to open an area where you'll be able to see how your style will work.

**g. Enter a reference**

Go to References/New Reference. Enter details. Close it. It should be visible in the library. If you click once on it, the formatted version should be visible in the preview pane.

**h. Downloading citations from catalogues and databases**

You don't have to type a citation if you can access a library catalogue or database through *Endnote's* Online Search.

Many library catalogues are available with *Endnote*. Also databases subscribed to by your library are accessible (e.g., ATLA, ProQuest).

To do this:

- In *Endnote* click on Online Search (using either the icon or Tools/Online Search) and choose a library or database.
- Enter a search term and click on Search.
- Highlight any references you want, then click on the icon 'Copy to Local Library'.

I can supply the following Connection Files:

ATLAS	Database with password access
DML (UFT)	Free access to library catalog
Mannix (CTC)	Free access to library catalog
Proquest	Database with password access
St Paschal (YTU)	Free access to library catalog
Ridley	Free access to library catalog

You can download them from my website at [www.rosslangmead.com](http://www.rosslangmead.com), on the Resources page. Put the files in the Endnote connection folder, probably found near the *Endnote* applicaiton itself.

**5. OTHER COMMENTS**

**a. Most people build one big library gradually**

Once you've started you generally add references one by one as you go. For most people it's easier to have one big library, and select sub-sets of it

as needed. It's so fast and convenient to find a reference that it doesn't matter if a library has thousands of references.

## **b. You can customise it but you don't have to**

A novice can use *Endnote* quite well by sticking to the well-known styles that come with the program. But if you read manuals well or have a knack for customising things to suit you, you can make *Endnote* your own.

*Endnote's* Australian distributors (Crandon, to be found at [www.crandon.com.au](http://www.crandon.com.au)) offer good help. You can either

- Check out their Frequently Asked Questions page ([www.crandon.com.au/EndNote/faq/help.html](http://www.crandon.com.au/EndNote/faq/help.html)).
- Email them at [info@crandon.com.au](mailto:info@crandon.com.au).
- Ring them on 02 6559 5777
- Take part in free webinars from time to time (see their Help page)

## **c. Back up your Endnote library often**

Your *Endnote* library soon becomes one of your most critical files. To lose it would be a disaster. So back it up often and variously. (In *Endnote*, see File/Save a Copy)

I keep my library with the rest of my data, not with the application, so it is backed up every time I back up my data.

I save it regularly with a date on it, e.g., 'Ross's References 30-9-12' then continue using the undated version, 'Ross's References'.

I also email it to my home computer, email it to a webmail address, save it to CD and keep it on a USB Key. I back up automatically to an external hard disk at home and at work. When it comes to your research you can never have too many dated backups.

## **d. Help available on the web**

The University of North Carolina has a good online tutorial on *Endnote*, to help you get going. It can be found at [www.hsl.unc.edu/services/tutorials/endnote/intro.htm](http://www.hsl.unc.edu/services/tutorials/endnote/intro.htm).

The University of Queensland is also most helpful. Its *Endnote* homepage is at [www.library.uq.edu.au/research-support/endnote](http://www.library.uq.edu.au/research-support/endnote). It has tutorials, connection files (particularly Australian ones) and other resources. It runs an email discussion list on *Endnote* difficulties.

The *Endnote* web site at [www.endnote.com](http://www.endnote.com) has connection files, technical support and an email discussion list on *Endnote* difficulties.

## 6. TRICKY AUTHORS' NAMES

Particularly institution names.

If you use no commas *Endnote* treats the last word as the surname.

If you use commas:

Everything before the first comma is treated as 'surname'.

Everything before the second comma is treated as 'firstname'.

Everything after that is treated as a suffix.

Examples:

<i>Entered</i>	<i>Appears in bibliography</i>	<i>Right?</i>	<i>Appears in footnotes</i>
Mary J Smith	Smith, Mary J	✓	Mary J Smith
Smith, Mary J	Smith, Mary J	✓	Mary J Smith
World Council of Churches	Churches, World Council of	✗	World Council of Churches
World Council of Churches,	World Council of Churches	✓	World Council of Churches
George G Hunter III	III, George G Hunter	✗	George G Hunter III
Hunter, George G, III	Hunter, George G, III	✓	George G Hunter, III

## 7. MODIFYING STYLES

You can tell *Endnote* how you want your style to look. I'll use Turabian Bibliography.

Edit > Output Styles > Edit 'Turabian' > Bibliography (or Footnotes)> Templates.

### a. Putting the punctuation outside the quotation marks for the title of a journal article or book section

e.g., Hamilton, Andrew. 'Why Malaysia Is No Solution'. *Eureka Street* 21.9 (May 2011).

(Americans punctuate inside quotes, while British and Australians tend to punctuate outside.)

Go through each reference type in the bibliography templates and footnote templates and move commas or full-stops.

### b. Adjusting quotation marks to be single or curly

The Turabian style comes with straight quotation marks. If you want curly ones (like Microsoft Word's 'smart quotes'), you need either to paste them into the *Endnote* styles from a Word document, or use the following within *Endnote*, which at least works for me:

Forward singles (')	OPTION + ]
Backward singles (')	SHIFT+OPTION + ]
Forward doubles (")	OPTION + [
Backward doubles (")	SHIFT + OPTION + [

Turabian also comes with double quotation marks, preferred in the US. You may prefer them single in citations. Change them within the style.

### c. **Two special characters** (this section for reference)

If you are going to modify styles much you need to understand two special characters in Endnote styles.

A 'strong space', called '**link adjacent**' and looking like a diamond (◆), means that if the word before or after it is absent, so is the space and whatever is next to it. It glues together the text either side. I use it liberally (but it's best not used between field names of more than one word, such as 'Series Title'). You can insert it by using the 'Insert Field' drop-down menu at the top right of the style window, or with OPTION + SPACE.

A vertical bar (|), called a '**forced separation**', can be entered from the keyboard (SHIFT + \). Anything between two separation bars is contained and doesn't affect things outside it. Here's an example:

Author. *Title*|◆Translated◆by◆Translator|◆Edition◆ed|◆  
Number◆of◆Volumes◆vols|◆Vol.◆Volume|◆Series Title|◆City  
|:◆Publisher|◆Year|.

If there is no translator, for example, that whole section between bars doesn't appear.

## B. **REFERENCING**

### 8. **WHY IT MATTERS**

Scholars who read your thesis need to be able to trace your citations if desired. Full and consistent citation is a large part of academic accountability.

For the examiners, care shown in the footnotes and bibliography creates confidence that care has been shown in the argument.

### 9. **PLAGIARISM**

It is of the utmost importance that everything you borrow from somewhere else is attributed, and that every time you use the words of others you enclose them in quotation marks. This is at the very heart of academic integrity, and plagiarism will result in being failed—a terrible result at the end of a huge project.

The Thesis Submission Form asks you to declare that ‘the thesis contains no material previously published or written by another person, except where due reference is made in the text of the thesis’.

## 10. CHICAGO STYLE

The MCD University of Divinity expects a ‘full, precise and consistent’ style in its theses (Regulation 25.2.6). The Thesis Submission Form requires the student to declare that the Chicago style has been followed, unless permission has been granted to use another style.

The Chicago style is the referencing format used by the University of Chicago, and is also called Turabian, because it is set out for research students in the book once edited by Kate Turabian:

Kate L Turabian et al, *A manual for writers of research papers, theses, and dissertations: Chicago style for students and researchers*, 7th ed. (Chicago: University of Chicago Press, 2007)

Doctoral students should own a copy. Masters students should at least have ready access to a copy. (They are less than \$16 bought from the Book Depository online.)

There are also guides provided by your RTI and many guides on the internet.

Scholars differ on the finer points of style, but the two most important principles in referencing, when in doubt, are:

Give full information, telling the reader what it is and where it is.  
Be consistent. Whichever way you do it, do it every single time.

I suggest you follow your supervisor’s guidance in these things.

## 11. IN-TEXT CITATION OR FOOTNOTES?

Both in-text citation (e.g., Smith 2011: 254) and footnotes are allowed by Chicago. Footnotes are more common in the humanities, with in-text citation more common in the social sciences.

I prefer footnotes because more information is provided on the same page. From here on I will discuss only the Footnote-Bibliography option.



## 12. THE BASIC ELEMENTS OF A FOOTNOTE OR BIBLIOGRAPHY REFERENCE.

Here are the three most common reference types. (Consult guides for the rest.)

	Footnote	Bibliography
Book	Laura M Hartman, <i>The Christian consumer: Living faithfully in a fragile world</i> (New York: Oxford University Press, 2012).	Hartman, Laura M. <i>The Christian consumer: Living faithfully in a fragile world</i> . New York: Oxford University Press, 2012.
Journal article	Robert A Hunt, 'The history of the Lausanne Movement: 1974–2010', <i>International Bulletin of Missionary Research</i> 35.2 (April 2011): 81–85.	Hunt, Robert A. 'The history of the Lausanne Movement: 1974–2010'. <i>International Bulletin of Missionary Research</i> 35.2 (April 2011): 81–85.
Book section	David Tacey, 'Spirituality in Australia today', in <i>Sacred Australia: Post-secular considerations</i> , ed. Makarand Paranjape (Melbourne: Clouds of Magellan, 2009), 44–64.	Tacey, David. 'Spirituality in Australia today'. In <i>Sacred Australia: Post-secular considerations</i> , ed. Makarand Paranjape. Melbourne: Clouds of Magellan, 2009. 44–64.

## 13. IBID OR ABBREVIATED CITATIONS?

Latin abbreviations have fallen out of favour, though some still use '*Ibid.*' (maybe with a page number) to refer to a work that appeared in the footnote immediately above.<sup>1</sup> Most scholars these days prefer abbreviated citations:

<sup>1</sup> Graham Hill, *Salt, light and a city: Introducing missional ecclesiology* (Eugene, OR: Wipf and Stock, 2012), 112.

<sup>2</sup> Hill, *Salt, light and a city*, 125.

<sup>3</sup> Hill, *Salt, light and a city*, 206.

## 14. BIBLICAL REFERENCES

When referring to a biblical passage as part of the ordinary text, such as talking about Romans 12 or Exodus 20:1–17, the name of the book is spelt out. When a reference occurs in parenthesis (Rom 12:1–2) an abbreviation is used. Find a system of abbreviations (e.g., from the front of a Bible) and be consistent.

It is good to say in the preface or an early footnote which version you will be using unless otherwise noted.

## 15. PUBLICATION DETAILS

The publication details for books can be confusing.

- Use the title page to get the exact title.

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<sup>1</sup> Kate L Turabian et al., *A manual for writers of research papers, theses, and dissertations: Chicago style for students and researchers*, 7th ed. (Chicago: University of Chicago Press, 2007), 155.

- Looking on the publication details page, use the first city listed. Be careful to find the city of publication, not the state or country.
- It is usual to give city and state, e.g., 'Eugene, OR' or 'Brunswick, Vic.', unless very well known, e.g., 'Chicago', where you have the option. If important, give the country: 'Birmingham, AL' and 'Birmingham, UK'.
- Use the last date published, but not the last date printed. In other words, when was the text last changed.
- If the book is classic or of historical interest and has been published, you may wish to list both dates, e.g., '1972 [1929]'.
- It is common to drop words like 'Press' or 'Publications' off the end of publishers' names, e.g., 'Orbis' instead of 'Orbis Books', but university presses are not usually abbreviated, e.g., 'Oxford University Press'.
- In all these things be informative and, above all, consistent.

## 16. INTERNET CITATIONS

Try to give information similar to that for books or articles on paper.<sup>2</sup>

- Who wrote it? Is it attributed to a person or an organization?
- What is the web page, email, blog entry, online document, etc., called? Treat this like an article or chapter, using quotation marks.
- What is the website, discussion forum, blog site, etc. called? Treat this like a book or journal title, using italics.
- Where did you find it? List the web address.
- What is the date of the piece, if given?
- When did you access it? 'Accessed 13-10-12'.

This is not acceptable as a footnote:

<sup>25</sup>[www.edinburgh2010.org/en/about-edinburgh-2010.html](http://www.edinburgh2010.org/en/about-edinburgh-2010.html).

This is:

<sup>25</sup> 'About Edinburgh 2010', *Edinburgh 21010: Centenary of the 1910 World Missionary Conference*, [www.edinburgh2010.org/en/about-edinburgh-2010.html](http://www.edinburgh2010.org/en/about-edinburgh-2010.html), 2010 (accessed 16-10-12).

Where references are available both on paper and online it helps the reader to have both sources. For example:

<sup>13</sup>Dana L Robert, 'Historical trends in missions and earth care', *International Bulletin of Missionary Research* 35.3 (July 2011): 123–128. Available at <http://www.internationalbulletin.org/system/files/2011-03-123-robert.pdf>.

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<sup>2</sup> This is covered in Turabian et al., *A manual for writers*, 177, 198.