Desktop EndNote guide 5

Using term lists

For EndNote version X7
This guide will introduce you to EndNote’s Term Lists facility to aid consistency and automatically apply journal title abbreviations if required.

More detailed information can be found in the EndNote Help Manual

Background information about EndNote is available on the Library website at: www.reading.ac.uk/library/endnote

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What are term lists?

Term lists are lists of keywords, author names and journal titles stored in EndNote. Lists are automatically generated for these three fields, but they can be created for any field where you might find it helpful, eg publisher’s name, place of publication. Term lists are linked to a specific EndNote library. These terms may appear in several different records and using them consistently helps with organising and outputting records.

Why use term lists?

Term lists enable you to

- save typing time and improve accuracy with long journal titles
- output several different versions of abbreviated journal titles
- ensure accuracy when typing author names which are hard to spell
- be consistent in assigning keywords
- search your Library for keywords

We recommend you import all the journal lists relevant to your work before starting to populate your EndNote library.

How do they work?

When you type in (or import or paste) a new author or journal name or keyword, it will automatically be added to the appropriate term list. This is a feature which you can switch on and off to suit your immediate needs (see the EndNote Help – look for Automatic Updating of Term Lists).

As you enter a new author name (or journal title or keyword), Endnote attempts to complete the name for you by suggesting the closest match from the term list. If you enter a new name which is not in the term list it appears in red to indicate an addition to the list.

Importing journal term lists

Many output styles require the use of abbreviations for journal titles, rather than the full title. EndNote comes with fourteen sets of journal term lists which contain standard abbreviations, which can be imported into your library: Anthropology, Archaeology, Astronomy and astrophysics, Bioscience, Chemical, Economics, Humanities, Korean medical terms, Law, Medical, Philosophy, Physics, Religion and Zoological records.
To import an appropriate list:

1. From the **Tools** menu select **Open Term Lists**
2. Select the **Journals Term List**

![Tools menu with open term lists selected]

3. Select the **Lists** tab and Click on **Import List**

![Term Lists dialog box with import list button highlighted]

4. **Browse** the folders on your PC to find the EndNote **Terms Lists** folder - usually in the Endnote Folder in the Program files on the C: drive:

![Folder contents with Terms Lists highlighted]
5. **Select the list** you wish to import, and click on **Open**

<table>
<thead>
<tr>
<th>Name</th>
<th>Date modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anthropology.txt</td>
<td>17/10/2012 20:12</td>
</tr>
<tr>
<td>Archaeology.txt</td>
<td>26/02/2013 09:38</td>
</tr>
<tr>
<td>Astronomy and Astrophysics.txt</td>
<td>21/09/2011 11:57</td>
</tr>
<tr>
<td>BioScience.txt</td>
<td>17/10/2012 20:13</td>
</tr>
<tr>
<td>Chemical.txt</td>
<td>17/10/2012 20:13</td>
</tr>
<tr>
<td>Economics.txt</td>
<td>21/09/2011 11:32</td>
</tr>
<tr>
<td>Humanities.txt</td>
<td>21/09/2011 11:38</td>
</tr>
<tr>
<td>Korean Medical Terms.txt</td>
<td>17/10/2012 20:13</td>
</tr>
<tr>
<td>Law.txt</td>
<td>17/10/2012 20:14</td>
</tr>
<tr>
<td>Medical.txt</td>
<td>27/02/2013 14:52</td>
</tr>
<tr>
<td>Philosophy.txt</td>
<td>17/10/2012 20:14</td>
</tr>
<tr>
<td>Physics.txt</td>
<td>17/10/2012 19:15</td>
</tr>
<tr>
<td>Religion.txt</td>
<td>12/10/2006 11:45</td>
</tr>
<tr>
<td>Zoological Records.txt</td>
<td>17/10/2012 20:16</td>
</tr>
</tbody>
</table>

The list will be imported into your library. If you click on the Terms tab once the list has been imported, you will see all the journal names. You can repeat this process for as many lists as seem applicable to your subject.

**Editing terms e.g. adding abbreviations for journal names**

Once you have imported as many journal title term lists as you need, take a look at one of the journals.

1. Click on the **Terms tab**.
2. **Click on one of the journal names** in your term list.
3. Click on **Edit Term**.
4. Note that there is space to have up to three different abbreviations for a title. Journal titles you have imported from a term list will usually have Abbreviation 1 filled in already. You can fill in an Abbreviation box if the version you need does not appear e.g. to remove full stops from abbreviation.

   It is possible to set your output style to use the full title or abbreviations 1, 2, or 3. To do this you will need to edit the 'Journal names' section of your output style to use the abbreviations held your term list. See *EndNote guide 4* for general guidance on editing output styles.

5. Click on **Cancel** to close the Edit Journal window.
6. Click on **Close** to shut the Journal terms list window.

**Tip:** When you download or import records from some databases, or copy and paste a reference, the full journal title may not be uploaded to EndNote and your references in Word documents may therefore be inconsistent.

Check your library and Terms lists for consistency, editing or removing different versions of the same title.
Adding terms manually

1. On the **Tools** menu select **Open Term Lists**, and select the list you want to add to e.g. Authors
2. In the Term Lists box select **New Term**.
3. Type in your new keyword i.e. an author’s name. Remember to use the format: Surname, Firstname.
4. Click **OK** to add a single term to the list and exit.

Separating terms

Where you have more than one term in a field (eg several authors or keywords) it is essential to tell Endnote where one term ends and the next begins. This is done through the use of punctuation referred to as delimiters or separators.

- **For authors**, the only acceptable delimiter is `<Ctrl-carriage return>`: separate authors must be entered on different lines.
- **For keywords**, and other term lists you create, you must either use the default delimiters which are `;` and `/` or you may change them or add more.
- When importing references from other databases, look carefully at how their keywords are separated: you may need to amend your references (eg if they use comma delimiters, or commas as part of the keyword (Hospitals, University). You can customise delimiters using the Define lists option in the Terms menu. (See the EndNote Help Manual for more information).

Adding keywords to your records from a term list

You can ensure consistency in assigning keywords by selecting them from your list when entering new records. (See the EndNote Help manual on Term Lists for more detail.)

1. Open a reference in your library.
2. With the cursor in the keyword field press **Ctrl-1**. This will produce the list of terms for that field.
3. Locate the term you want, double click it. This will insert it into your reference.
4. Don’t forget to put a delimiter in after it (`;` or `/`) before adding more keywords.

Tip: add multiple keywords by holding the Ctrl key down whilst clicking on the keywords.
Creating a new term list for another field

EndNote allows you to create term lists for other fields. This can make your data entry faster. The example below shows you how to create a term list for the Place of publication field.

Creating the list
1. Open a library.
2. From the Tools menu select Define Term Lists.
3. Check that your library name is showing at the top of the dialog box.
4. Click Create List and enter the name for the new list (e.g. Place).

5. Click OK. Leave the window open for the next step.

Linking the list to a particular field
1. Select the bottom option Link Lists.
2. Check that your library name is showing at the top of the dialog box.
3. Locate the Field you want to make a list for (Place Published). This displays on the left hand side of the screen (you may need to scroll down).
4. Select the name you have chosen for the list (eg Place) from the pick list on the right.
5. Click **OK**. Leave the window open for the next step.

**Adding terms to your new term list**

If you already have references in this library you can add the place names from these references to the new term list.

1. Choose **Place**.
2. Click **Update List**.
3. Confirm the field from which you wish to add terms to the list (eg **Place published**).
4. Click **OK**.
5. Review the list using the **Terms** tab and edit any errors e.g. remove any unwanted brackets or punctuation.
   
   If you have duplicate entries in your list e.g. Chichester in this example, delete the one you don’t want and then use the Search facility in EndNote to find and manually change all entries to match your preferred place name.

   There is a Find and Replace facility in the Edit menu called “Change Text”, but this should be used with caution.

**Further information and help**

- Consult the EndNote information on the Library website at:  
  [www.reading.ac.uk/library/endnote](http://www.reading.ac.uk/library/endnote)
- Use the Help button within EndNote
- Visit the EndNote website - provides technical support; updates to filter, connection and output style files; FAQs and tip sheets.  
  [www.endnote.com/support](http://www.endnote.com/support)

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