

Review of *EndNote 3.0.1*, published by Niles Software Inc. <http://www.EndNote.com>, US\$300.00 (US\$99 for students with valid ID).

I am at best an impatient bibliographer. In the excitement of actually getting words on paper, I'm often inclined to include citations like "As argued in Shlomsbordus (19XX) pp ???" or make little footnotes to myself: ¹ find out who said this first – think Saussure XX? After all, if I interrupted my flow of thought to get the actual dates and relevant page of Shlomsbordus' opus, or send a note to some knowledgeable person asking about what Saussure may or may not have asserted, the flow might slow to a trickle, or pool into a stinky, smelly, stagnant, sulfurous swamp, and I might never get to the end of the page. Of course, when I triumphantly arrive at the end of the paper, my moment of accomplishment and satisfaction is soon smothered by the prospect of hunting down all those sources and page numbers, typing out references, and matching citations to references and references to citations. Inevitably, of course, there's some conference talk whose handout I've lost, or an obscure volume that I returned to the library and has since been taken out again by a faculty member who's now on sabbatical in Tupungato, or a ms. that may now be forthcoming, but I'm not sure where or if it's just under review, or a crucial argument about dative movement in a 817-page book whose index entry for dative movement looks like this: *dative movement*: 2, 3, 4-12, 18, 21-22, 44, 46, 48, 50, 52, 60-74, 80, 100... you get the idea. Or all of the above. And I am cast into despair.

Even if my sad case is contrasted with that of the prepared individual who sits, surrounded by neat piles of the relevant photocopied articles, journals, books, handouts, msses, etc. and includes each relevant citation in full as she goes, preparing references is

a tedious and time-consuming process. Many scholars of my acquaintance use their thesis bibliography as a sort of basic database, cutting and pasting references from it, adding new ones as necessary. Even if one adopts this procedure, the tasks of checking the existence of every cited paper in the list of references and vice versa, and reformatting references to comply with the style of the journal you're submitting to is both mind-numbingly boring and incredibly picky work. It's the kind of job a computer should be able to do for you, if there was only some good software available. And now, coming to the point at last, I have discovered that of course there is.

Of course, this is really old news. EndNote and other reference-managing software have been around almost as long as word processing software. I was just out of the loop. EndNote, once you have entered the citation information for a given item in your reference library, will cite for you, compile for you, format for you in any style you like, and you'll never have to cross-check your references again. I'll share my revelations with you about that in a bit.

But the really new news is that EndNote now talks to online databases. What's especially exciting about this is that it could mean *never having to type in any reference again*. I'm very, very, very happy about this possibility. Essentially, EndNote has become an online catalog search-engine. If you're connected to the web, via modem or ethernet, EndNote can link to any online database in a "Z39.50" format (clearly the fancy sports car of database formats). This includes many university and other libraries, including the Library of Congress, the Medline database, the MLA database, Dissertation Abstracts International, Current Contents, etc. etc. etc.

What happens is the following: you select “Connect” from your EndNote file menu and specify which database you wish to connect to (automatic connection files come with EndNote for all of the above, or you can set up your own). Some databases require that you or your university have an account with them, and require a username and password, but many are free, including the university library catalogs and the Library of Congress catalog. Once you’ve connected, EndNote acts like a standard catalog interface: search for any term in any field that the catalog makes available, and EndNote collects all relevant references and displays them. You select any you want to keep, save them to your reference library, and presto, there they are the next time you want to cite them. For instance, if I connect to the University of Arizona library, and search the “Author” field for Howard Lasnik, EndNote collects 6 book references and shows them to me. I import them into my EndNote library, and the next time I want to cite Lasnik and Saito 1992, *Move [alpha]: conditions on its applications and output*, it’s in my database already, complete with number of pages (222), ISBN # (0262121611), call number (P158 .1375 1992) and keywords (Generative grammar, Grammar, Comparative and general Syntax).

Of course, university libraries don’t catalog individual articles. However, databases like that of the Modern Language Association do, and if one can connect to the MLA database, theoretically any article published on language or linguistics since 1963 is available to you. The MLA database, however, accessed by FirstSearch, is one of those for which one needs an account, and while many or most universities have such an account and all university affiliated persons are entitled to access it, I haven’t yet attempted to dig through the necessary university administratrivia necessary to get a

password and username that will allow me to connect to the MLA database directly through EndNote. I'm confident that it must be possible, however, and once that's accomplished, no citation will ever escape me again.

On to more specific thoughts about using EndNote as a reference managing tool. For those who are interested, I'm talking about EndNote 3.0.1, run on an original, Bondi Blue iMac, in conjunction with Microsoft Word '98 and also Word 5.1. Note, however, that the program is advertised as compatible with many other word processors and formats, including Word Perfect, ClarisWorks/AppleWorks, WriteNow, MacWrite, FrameMaker MIF format, HTML, and RTF.

Initially, of course, using EndNote is like making any other bibliography. For every new citation you make in the first few papers you write using EndNote, you have to enter the full bibliographic detail for each citation. At first, this will be virtually every citation you make. As your library of references grows, however, you'll arrive at that happy state where the only new information you need to enter are the few recent articles that you consulted for the first time when considering the issue at hand. I actually spent three or four days entering a reference for every book or article in a book in my personal library, annotating them "own book", and have since used it as my own personal catalog.

Once you type the final period of your paper (or at any time, really), with all citations inserted by EndNote from the library of references you've created, you simply ask EndNote to format the bibliography of the paper for you. You get to create the style, by modifying a semi-standard journal format (they provide more than 300 bibliographic styles to choose from, none of which matches that of any linguistic journal that I'm familiar with, although psycholinguists may be happy to know that *Cognition* is

included). Because most journals have annoying, trivial differences in their house bibliographic style, you'll probably want to create one for each journal. (This whole business maddens me. There is no substantive distinction between the choice to put a period or a colon after the author's name, or to enclose the year in brackets or not, or to italicize book titles or not, or to put the city of publication before the publisher's name or vice versa; the only reason I can conceive of for the plethora of bibliographic styles out there is to cause headaches for authors. Of course, some choices make a difference, but the simple application of common sense resolves most such questions. Fortunately, now that EndNote has entered my life, it no longer matters, and peace is mine.) So let's say that journal A is not insightful enough to desire to publish your masterwork without revision; you simply select the style for a competing journal B, choose "Format Bibliography," and *voilà*, in less than a minute you're ready to print, mail it off, and wait to hear from the next editor.

Using EndNote in conjunction with Microsoft Word is especially easy, because the software has an "Add-In" feature that gives you some EndNote commands in your Word "Tools" menu, and (so they say) it is not necessary to "leave" your word processor to work with EndNote. The Word '98 Add-In does let you do some things without leaving your word processor (notably formatting the bibliography), but when you want to select a reference to insert, it does switch you to EndNote — you're not, strictly speaking, working directly through Word anymore. Once you've selected and inserted the citation, though, it does automatically switch you back. It was a bit sad to discover that the Word 5.1 EndNote interface (called a "Plug-In Module", rather than an "Add-In") was considerably better, in my opinion. In Word 5.1, you do get to work with EndNote

directly through Word: you get a whole pull-down menu on your Word menubar which gives you direct access to all EndNote commands. You can customize Word '98 to include EndNote commands in its menus, if you want — but I liked the 5.1 whole-menu interface better. Be warned, Word 5.1 users: the citation markers used by EndNote in Word 5.1 are different from those used with any other word processor, making a special, not-too-tricky procedure necessary to translate documents to and from Word 5.1. (EndNote+Word '98 seem to happily read unformatted EndNote+Word 5.1 documents, even when no not-too-tricky procedures have been performed, but I did run into snags the first time I tried, which I wasn't able to discover the cause of and which didn't repeat.)

Some tips for newbies like myself:

a) EndNote automatically uses the APA's style for in-text Author-Date citations, which involves putting brackets around (Author, Date), and organizing lists of cited works by year. You'll want to eliminate those brackets in the in-text citation style, since, for the most part, linguistics journals only bracket in certain circumstances. With respect to lists of citations, you'll probably want to insert an "and" as text before the last citation (Jollnergar 1996, Paf 1993, and Shlomsbordus 1991). Be warned: the unformatted citations (which are the ones you modify to get the "and" text inserted) are inserted alphabetically, but after formatting, they're organized chronologically (again an APA style thing, but also standard, I believe, in some linguistics journals). This means that the last reference in the list when they're unformatted may not be the last citation in the list when they're formatted. Be careful to insert your "ands" and "especially"s accordingly — otherwise you'll end up telling interested readers to consult the work of "and Shlomsbordus 1991, Paf 1993, Jollnergar 1996".

b) If you're entering large quantities of citations by hand, particularly if they're a series of articles in a book (so that many of the fields are identical for a number of items), you'll find that making a tab-delimited text file in a word processor and importing it to EndNote simpler than doing each one in EndNote separately, since you can't copy and paste more than one field at a time in a "New Reference" window. Of course, you can also usually save the results of on-line searches in catalogs as tab-delimited text (when you're not using the EndNote "connect" feature) and, with a few modifications, import those files into EndNote as well. The "connect" feature is niftier, though.

c) EndNote inserts its citations enclosed in square brackets []. When it is time to format the citations, the program searches through the text for all instances of square brackets, and attempts to parse the contents as citations. It doesn't succeed, of course, unless the contents are in fact citations, but it reports all instances of square brackets without citation-like contents as "mismatched citations". In most linguistics papers, this can cause a certain amount of worry, because although it doesn't do anything to the square-bracketed things it can't recognize, a moderate number of bracketed syntactic, phonological or semantic structures can add up to a lot of mismatched citations. Instead, you can just change the markers EndNote uses to enclose its citations (in the Edit menu): <>, {}, etc.

Despite the fact that I'm a convert, EndNote does have some drawbacks and limitations. There are three limitations that I've stumbled across so far that bug me.

First, although in the Title field, EndNote will allow you to mix characters from different fonts and selective text marking (italics on one or two words in a title, e.g., or

IPATimes characters mixed with Times characters), this is not the case in the Author field.\. Particularly annoyingly, this is not reflected in the EndNote “Reference” box — there, the author’s name will appear complete with any *ds* or other strange characters you need to include from non-standard fonts. However, when the citation is formatted in your document, the font and characteristics of the first character (usually your normal text) will be imposed on the whole name.

Second, EndNote only gives you two choices for dealing with given names: initials or full names. Of course, if you’ve only entered a middle initial, that is all that will appear in the full reference, but a problem arises when dealing with complex names, where the introductory particle (e.g. *den* as in “den Dikken”) is not used to alphabetize. The way such a name is entered is either “Marcel den Dikken” or “Dikken, Marcel den”, but either way, EndNote treats the particle as a middle name. Result: when only initials are desired, the name appears in the reference as “Dikken, M. d.”, not correctly as “Dikken, M. den”. (A related issue, which does have a solution, is complex surnames where the particle or first surname is used to alphabetize, like “van Hout”. In such cases, enter the name in the Author field as “van Hout, Angeliek”, and it will appear correctly alphabetized under “V” in the bibliography. Don’t enter it as “Angeliëk van Hout”, however, as then EndNote will treat “van” as a middle name.)

Third, EndNote doesn’t have a capitalization function for book titles. This may not be such a problem as I first imagined; on consulting a few journals, it seems that most use sentential (first-letter-only) capitalization for book titles as well as articles. I imagine, however, that some might require a “significant-word” capitalization strategy, and a function to capitalize all but function words in a title could be a valuable addition to a

style. As it is, however, if some journal does require capitalization of significant words in book titles, you're back to the bad old days of changing lowercase to uppercase by hand; the title will appear as you first typed it in.

The main drawback of EndNote is that, like most neat software, it's quite pricey (as Unix users will delight in pointing out): \$300 for most people. Students listen up, however — if you can send them a valid student ID, it's only \$99. That's still a big chunk of cash for most students, I realize, but it'd make a *great* present; mention it to any well-off folks who're buying you presents at the next significant occasion. In particular, if you're about to start writing a dissertation, I really recommend it. It'll save you an eternity of grief when the filing deadline is looming.

If you're interested in other odes to EndNote, plus some good ideas on using its quite substantial capabilities to the max, check out the stories at http://www.EndNote.com/home/Application_Note.htm. It could be an invaluable tool for organizing departmental libraries, constructing up-to-date bibliographies on specific topics, saving your notes on specific articles as you read them, and quite a bit more.

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