

## Systematizing Source Management and Citation in Academic Writing Using EndNote: My Lived Experience

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### Abstract

It is assumed that a reference management software, such as EndNote, systematizes the intricate process of source management and citation in academic writing by providing users with the ability to construct personalized digital libraries. This paper explores the validity of this postulation, specifically within the context of the American Psychological Association (APA) 7th style of citation, focusing on the EndNote software programme. Drawing on my firsthand experience with EndNote X9 and my responsibility for instructing master's degree students, as well as MPhil and PhD scholars in the utilization of the software, I have reflected on the software's remarkable features as the evidence of how the proper use of EndNote systematize citations in academic writing. Through practical examples, I have elucidated how EndNote facilitates the systematic citation of sources in academic writing. Based on the overall findings, it is evident that EndNote, when utilized to its full potential, effectively systematizes citations in academic writing. This enables researchers to redirect their focus to the core aspects of their work—conducting and disseminating research through report writing. In essence, EndNote becomes a tool that empowers researchers to concentrate on substantive contributions, emphasizing the significance of efficient source management in scholarly endeavors.

**Keywords:** Citation, EndNote library, library management, references, source management

### Introduction

Citation management software, commonly referred to as reference management software, plays a pivotal role in the organization, storage, retrieval, and citation of sources within Microsoft Word, contributing significantly to the efficiency of academic writing processes (Lonergan, 2017). The popularity of such tools, including but not limited to EndNote, BibTex,

RefMan, Mendeley, RefWorks, and Zotero, has surged among students and faculty in higher education worldwide. In recent times, citation management software, notably EndNote, has gained popularity among thesis students across various universities in Nepal as well (Sharma, 2023a).

EndNote, stands out as a versatile reference management software, not only enabling the management and citation of sources but also storing diverse types of content, such as “pdf files, pictures, graphs, [and] tables” (Sherwin, 2020, p. 1). The integration of features like Cite While You Write (CWYW) further facilitates the retrieval and formatting of citation in Microsoft Word documents.

In my academic writing journey spanning the last four years, EndNote X9 has been my go-to tool for composing books, articles, and theses. Moreover, I have taken on the role of guiding master’s degree students and researchers pursuing MPhil and PhD studies at the Graduate School of Education, Faculty of Education, Tribhuvan University, Kirtipur, Kathmandu, in harnessing the capabilities of EndNote for their assignments and thesis writing endeavors.

As a novice user and trainer of EndNote, my experience has been both rewarding and challenging. I encountered various issues, from the initial stages of installation and library creation to the intricacies of synchronization and reference management. Through persistent efforts and a process of trial and error on different computing devices, I successfully navigated and resolved these challenges.

Currently, my engagement with EndNote enables me to incorporate in-text and end-text citations into my Microsoft Word documents without the need to type even a single character, except for in-text non-parenthetical citations in possessive forms, such as ‘William’s (1998) idea that . . .’ My skill of utilizing EndNote has not only systematized and expediated my own writing processes but has also allowed me to assist others more effectively.

An especially noteworthy aspect of using citation management software is its impact on time efficiency. When dealing with references available in databases like Google Scholar and other online sources, the manual entry process is significantly reduced. References can be effortlessly imported into the EndNote library with just a click, freeing up more time and energy to focus on the actual content of the academic work.

My journey with EndNote X9 has been transformative, not only enhancing my personal writing experiences but also enabling me to empower others in their academic pursuits. The dynamic features of citation management software have undeniably become integral to the contemporary academic writing landscape, offering both efficiency and precision in source management and citation.

In this paper, the term ‘citation’ or ‘reference’ is taken interchangeably and holistically, comprising two integral components: in-text citation and full reference citation, also denoted as ‘end-text’ or ‘end-of-paper’ citation, (see APA, 2010, 2020). Accordingly, the interchangeable usage of ‘citation manager’ and ‘reference manager’ is employed throughout, recognizing them as synonymous entities.

The conceptualization of referencing or citing extends beyond a mere notation of sources; it encapsulates a comprehensive system for indicating the origins of ideas, theories, quotes, facts, and any other evidence incorporated in academic writing. This encompasses both in-text and reference citations, aligning with the insights presented by Shibly (2016).

The current literature offers limited insights into the salient attributes of EndNote that modernize citation formatting in academic writing according to APA 7th style of writing as a whole and the style of citation in particular. Notable works by Hensley (2011), Lonergan (2017), Lorenzetti and Ghali (2013), and Mendes et al. (2019) explore various facets of citation management software, focusing on their application, usability, and user preferences. On the other hand, research works by Walker et al. (2007), Hupe (2019), and Sherwin (2020) underscore the attributes and significance of EndNote, providing essential usage guidance for using it. Similarly Sharma (2023a) and (Sharma, 2023b) offer comprehensive strategies for precise citation formatting in both APA 6th and 7th styles, achieved through strategic adjustments to EndNote reference types and output styles. The supplementary materials by Agrawal (2009) and Clarivate Analytics (n.d.-a, n.d.-b) provide more detailed instructions on EndNote utilization. However, the existing research literature lacks comprehensive exploration of the distinctive features that empower EndNote to methodically organize citations in accordance with APA (2020). This article aims to bridge this research gap by investigating the specific attributes that facilitate EndNote in systematizing citations within scholarly writing.

The primary focus of this article, therefore, is to illuminate the transformative impact of utilizing EndNote for systematic source management and citation in academic writing, drawing from my lived experience of using the software for citation in academic writing. By sharing this experiential journey, the paper aims to empower readers in systematizing and expediting their own academic writing endeavors.

To achieve this goal, I navigated the intricacies of EndNote, demonstrating essential operations through textual elucidation and accompanied by illustrative screenshots. These operations specifically relate to citing sources within a Microsoft Word document from the EndNote library, showcasing the unified generation of accurate in-text and end-text citations, adhering to the APA 7th style of citation.

The anticipated beneficiaries of this paper span a diverse spectrum, encompassing academic writers, researchers, research supervisors, librarians, EndNote trainers and users, and

even those who have not yet acquainted themselves with EndNote but express a willingness to integrate it into their academic writing toolkit for efficient source management and citation.

### **Methodology**

This research project is dedicated to delving into the intricate details of my personal experience with EndNote, aiming to unearth the underlying essence of its use and derive meaningful insights from the journey. To achieve this, I employed an auto-hermeneutic phenomenological approach, a methodology that, as articulated by Sahhar et al. (2022), “offers the potential for understanding the deeper characteristics of experience from the stance of a subject” (p. 49). Such a design, thus, possesses the capability to unravel the profound characteristics of an experience from the perspective of the subject. Aligning with this view, Gorichanaz (2017) describes auto-hermeneutics as “a systematic way to explore and describe the ontological nature of one’s own personally lived experience” (p. 1).

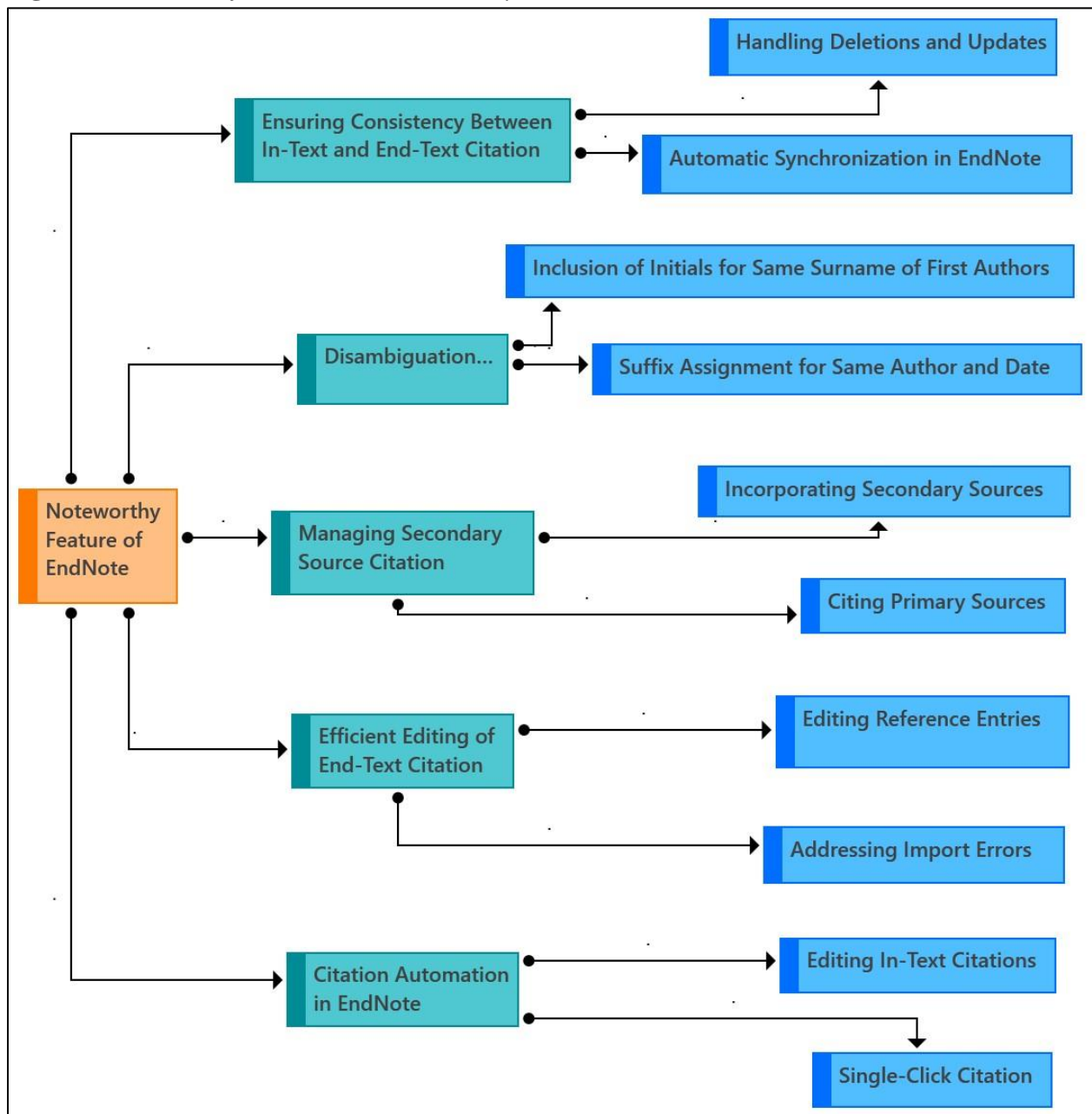
The data, constituting my lived experience with EndNote spanning four years, was analyzed thematically. This analytical process was complemented by a presentation of findings utilizing a verbal descriptive approach and a demonstration-through-writing-and-screenshots method. The intention behind adopting these methods was to vividly convey the essence of using EndNote, providing readers with concrete insights into its noteworthy features that not only systematize but also accelerate academic writing.

The scope of this exploration was confined to ‘EndNote X9,’ a specific version of the software, and the application of the APA 7th style of citation, adhering to the same style of writing and citation. By contextualizing my lived experience within the framework of these specific parameters, the aim was to offer a nuanced understanding of the practical implications and benefits of using EndNote in academic writing. Through a combination of written discourse and illustrative screenshots, the paper serves as a medium to share the nuances and intricacies encountered during my prolonged engagement with EndNote, emphasizing its significant impact on the academic writing process. This research seeks not only to provide valuable insights for individuals already familiar with EndNote but also to offer guidance and inspiration to those contemplating its integration into their academic writing endeavors.

### **Noteworthy Citation Management Features of EndNote: Results and Discussions**

I have analyzed and interpreted the data, the lived experience of mine on the use of EndNote thematically in terms of remarkable features of EndNote regarding citation management as indicated in Figure 1.


**Figure 1.** Network of Holistic Thematic Analysis



Note. ■ = global theme; ■ = organizing theme; ■ = basic theme

### ***Citation Automation in EndNote***

We can cite either a single source or multiple sources just in a click and effortlessly edit in-text citations as required in a short series of commands.

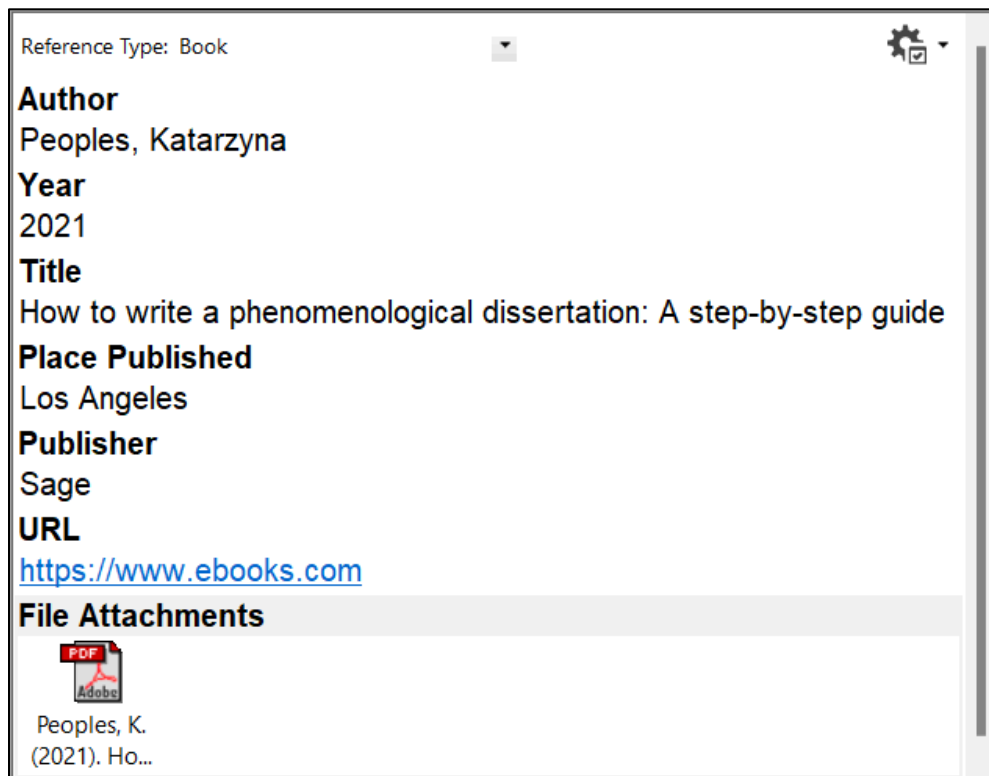
**Single-Click Citation.** Once the references are managed in an EndNote library and manipulated through a few simple commands on a computer, we can cite a single work or multiple works (called multiple works citation) in an intended place in a word document, by clicking on a single button in the library resulting in the accurate in-text citation accompanied with the end-text citation at the end of a particular section or of the whole text. The process involves placing the cursor in the specific location within the Word document where the in-text citation is required, navigating to the EndNote library, selecting the relevant reference, and citing it with a simple click on the ‘Insert Citation’ symbol ‘’ in the EndNote library toolbar or by using the shortcut ‘Alt+2’ (Agrawal, 2009). This procedure ensures the precise placement of in-text citations throughout the document, with the corresponding full reference citations automatically appearing at the end of the text in the desired writing style.

For example, when I cite from the EndNote library a work with the publication information managed in the EndNote library as indicated in Figure 1, it results in:

(Peoples, 2021)

Peoples, K. (2021). *How to write a phenomenological dissertation: A step-by-step guide*. Sage. <https://www.ebooks.com>

**Figure 2.** Reference Field for a Book by Single Author



The image shows a screenshot of an EndNote reference field for a book by a single author. The reference type is set to 'Book'. The fields are filled with the following information:

- Reference Type:** Book
- Author:** Peoples, Katarzyna
- Year:** 2021
- Title:** How to write a phenomenological dissertation: A step-by-step guide
- Place Published:** Los Angeles
- Publisher:** Sage
- URL:** <https://www.ebooks.com>
- File Attachments:** A PDF icon is shown, with the text 'Peoples, K. (2021). Ho...' below it.

Similarly, upon citing multiple works from the EndNote library the resultant citation, for example, appears as follows:

(Allen, 1953; Peoples, 2021)

Allen, W. S. (1953). *Phonetics in ancient India*. Oxford University Press.

Peoples, K. (2021). *How to write a phenomenological dissertation: A step-by-step guide*. Sage.  
<https://www.ebooks.com>

This is the “parenthetical citation of multiple works” (APA, 2020, p. 51). This shows that the in-text parenthetical citations are automatically ordered alphabetically, “separating them with semicolons” (APA, 2020, p. 263), that is “in the same order in which they appear in the reference list” (APA, 2010, p. 177). This approach has been consistently applied for every citation in my recent works of writing.

**Editing In-Text Citations.** There is provision of editing default in-text citation in EndNote as required by the context. If I need to change any default parenthetical in-text citation, ‘(Peoples, 2021)’ for example, into non-parenthetical one, I write click it; go to ‘Edit Citation(s)’; and click ‘Display As: Author (Year)’ to get it changed into ‘Peoples (2021)’.

Moreover, we can indicate the page number(s) of the cited text systematically through EndNote. The page number(s) should be indicated in the in-text citation when citing ‘direct quotation’ where the words verbatim from another work or from the author’s own previously published work (APA, 2010; APA, 2020). For example, when I write click the parenthetical citation, namely (Allen, 2004), for example, and go to ‘Edit Citation(s),’ click ‘More,’ type the required page number (20, for example) in the ‘Page’ slot, and click on ‘OK,’ the citation appears as: (Allen, 2004, p. 20).

Similarly, to change citation into possessive form such as: ‘Allan’s (2004) work concludes that . . .,’ I type ‘Allen’s’ before the default citation as, ‘Allen’s (Allen, 2004).’ Then I exclude author from the default citation to get ‘Allen’s (2004),’ without disconnecting it with the corresponding end-text citation.

### ***Efficient Editing of End-Text Citations***

The reference errors imported from databases as well as the reference entries under each reference can be edited efficiently in the EndNote library.

**Addressing Import Errors.** While importing references to the EndNote library from any data base, something may go wrong. In such a case, we can fix it by editing. For example, once, when I imported reference from Google Scholar, I got the citation in Word document as follows:

(Alkamel & Chouthaiwale, 2018)

Alkamel, M. A. A., & Chouthaiwale, S. S. (2018). The use of ICT tools in English language teaching and learning: A literature review. *Journal of English language and literature (JOELL)*, 5(2), 29-33.

In this citation, the end-text citation does not conform with the APA style of citation in that the journal name is in sentence case instead of title case, and page numbers are separated by hyphen '-' instead of en dash '–'. The abbreviated form of the journal name is also unnecessary. Later, I edited them accordingly entering into the respective fields in the reference panel of the EndNote library and saving the change to get the accurate citation as follows:

(Alkamel & Chouthaiwale, 2018)

Alkamel, M. A. A., & Chouthaiwale, S. S. (2018). The use of ICT tools in English language teaching and learning: A literature review. *Journal of English Language and Literature*, 5(2), 29–33.

**Editing Reference Entries.** The entries of the references, including the ones added manually or imported from travelling library, can similarly be edited and saved to achieve the precise citation aligning with the APA style of writing. All the inaccuracies in the citations of already cited sources can be then corrected by clicking on 'Update Citations and Bibliography' icon under 'EndNoteX9' tool bar in the concerned Word document.

### ***Managing Secondary Source Citations***

There is no need for manual adjustment even for managing secondary source citation. The secondary source can be easily incorporated within the citation of the source the author gone through.

**Citing Primary Sources.** The “works that you have read” (APA, 2020, p. 253) are the primary sources, and the secondary source refers to the “content first reported in another source” (APA, 2020, p. 258)—the content cited in the primary sources. For example, in one of my works, I have cited an extract by Passy (1899), which has been cited in Kelly’s work published in 1969. In this case, Passy’s work is primary source and Kelly’s work the secondary. If we are using a primary source, it can be easily cited through EndNote library and be edited as required as discussed already in this paper.

**Incorporating Secondary Sources.** When incorporating secondary sources into our writing, it is essential to acknowledge them appropriately in in-text citations. This is indicated by

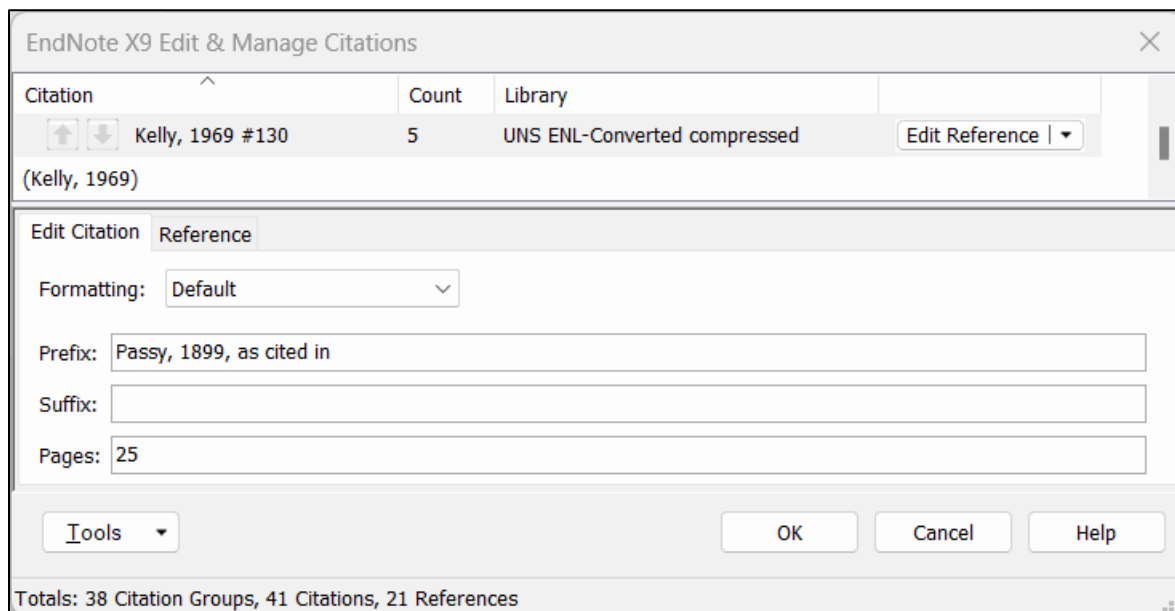


writing “as cited in” preceded by the primary source with the year of publication if known and followed by the secondary source (APA, 2020, p. 258). The following example showcases the incorporation of secondary source in parenthetical citation of a block quotation:

As any hint of exaggeration must be avoided, I must add that it would not be good to reject, absolutely and systematically, all recourse to the mother tongue. In exceptional circumstances it could happen that one might be in too much of a hurry to use gestures and explanations in the foreign language. (Passy, 1899, as cited in Kelly, 1969, p. 25).

To achieve this citation through EndNote, I edited the default citation of the secondary source as shown in Figure 3.

**Figure 3.** *Editing the Secondary Citation to Indicate Primary Source*



### ***Disambiguation of Works***

According to APA (2020), it is necessary to clarify and distinguish between cited works. This process can be efficiently handled by using EndNote for citation management, where the disambiguation is automated. The ambiguity may occur due to the works with same author and date or due to the same surname of two or more primary authors.

**Suffix Assignment for Same Author and Date.** Works by the same author(s) with the same publication date should be distinguished by the suffixes a, b, c, and so forth, after the year of publication (APA, 2010, 2020). The suffixes are assigned in both in-text and end-text citations. This is automatically managed while citing through EndNote library as shown as follows, for example:

(Garcia, 2013a, 2013b)

Garcia, O. (2013a). Theorizing translanguaging for educators. In C. Celic & K. Seltzer (Eds.), *Translanguaging: A CUNY-NYSIEB Guide for Educators* (Revised ed., pp. 1-6). CUNY-NYSIEB, The Graduate Centre. <https://www.cuny-nysieb.org/wp-content/uploads/2016/04/Translanguaging-Guide-March-2013.pdf>

Garcia, O. (2013b). Translanguaging to teach English in Nepal. *NELTA Choutari, a professional blog*. <https://neltachoutari.wordpress.com/2013/07/01/translanguaging-to-teach-english-in-nepal/>

**Inclusion of Initials for Same Surname of First Authors.** The citations of sources with different authors with the same surname should be disambiguated by including the first authors' initials in all in-text citations as shown in the following example:

(T. P. Sharma, 2021; U. N. Sharma, 2021)

Sharma, T. P. (2021). Novelty in learning strategy. *Learning and Instruction*, 33(2), 28–52.

Sharma, U. N. (2021). Teachers' beliefs on students' home language as a resource in EFL classroom. *Studies in ELT and Applied Linguistics*, 1(1), 116–126.

<https://doi.org/10.3126/selta.v1i1.40612>

If the first authors of multiple references share the same surname but have different initials, include the first authors' initials in all in-text citations

### ***Ensuring Consistency Between In-Text and End-Text Citations***

An additional noteworthy benefit observed while employing EndNote for citation management is its assurance of precise citations, minimizing the potential for discrepancies between in-text and end-text citations when the process is correctly executed. This reliability is evident through the following features inherent in citation using EndNote.

**Automatic Synchronization in EndNote Citation.** “Each work cited in the text must appear in the reference list, and each work in the reference list must be cited in the text” (APA, 2020, p. 257). EndNote automatically manages it. It is because EndNote incorporates each work cited in the text in the reference list regardless of the number of in-text citations.

**Handling Deletions and Updates.** If and only if we delete all the tokens of an in-text citation from a text the corresponding reference citation is automatically deleted from the reference list. However, we cannot remove in-text citations by removing the reference citation. Moreover, all the deleted reference citations reappear in their respective location in alphabetical order when we update citations utilizing the ‘Update Citations and Bibliography’ icon under ‘EndNote X9’ toolbar. In my EndNote citations, such as Lado (1957), Sharma and Banjade

(2023), Luitel et al. (2023), and Sharma (2017), some are referenced only once while others are cited multiple times. The resulting in-text citations, along with their corresponding entries in the reference list, appear as follows:

Sharma (2017),

Lado (1957)

Sharma and Banjade (2023)

Lado (1957)

Luitel et. Al (2023)

Sharma (2017),

Lado, R. (1957). *Linguistics across cultures: Applied linguistics for language teachers*. The University of Michigan Press.

Luitel, B., Poudel, K. K., Sharma, U. N., & Karki, T. M. (2023). Uses of the first language in the English as a foreign/second language classroom: Teachers' views and arguments. *TEFLIN Journal*, 34(2), 245–263. <https://doi.org/10.15639/teflinjournal.v34i1/245-263>

Sharma, U. N. (2017). The role of supervisor and student for completing a thesis. *Tribhuvan University Journal*, 31(1 & 2), 223–238. <https://doi.org/10.3126/tuj.v31i1-2.25358>

Sharma, U. N., & Banjade, G. (2023). *A course in phonetics and phonology: MEd first semester*

Removing one of the in-text citations for Lado does not affect the reference list, as there is still another citation of Lado in the text. It is only when all instances of the citation for Lado (1957) are deleted that the entry is also removed from the reference list.

In relation to reference citations, if certain entries are intentionally or unintentionally deleted from the reference list, they will reappear when we update the citations using EndNote.

The above discussed features of EndNote are just a few basic ones among many others lived in my consciousness. Some of them includes: appearance of reference list in the intended place, auto-arrangement of reference list in alphabetical order, exclusion of personal communication in references and alphabetical arrangement of multiple-works citations within the same parenthesis. However, this is not 'an exhaustive list of features of EndNote', which is beyond the scope of a paper of this type.

## Conclusion

In conclusion, this article has delved into the transformative impact of utilizing EndNote, specifically EndNote X9, in the context of academic writing, with reference to APA 7th style of citation. Through a phenomenological approach, I, as both a user and trainer of EndNote, have explored the software's remarkable features and their practical implications for systematic source management and citation.

The findings of this research project affirm the validity of the assumption that reference management software, like EndNote, significantly systematizes the intricate process of source management and citation in academic writing. The paper has provided valuable insights into the holistic thematic analysis of the notable features of EndNote, including citation automation, efficient editing of both in-text and end-text citations, management of secondary source citations, disambiguation of works, and ensuring consistency between in-text and end-text citations.

The article not only highlights the efficiency and time-saving aspects of EndNote but also emphasizes its role in enabling researchers to redirect their focus to the core aspects of their work. By automating citation processes, EndNote becomes a powerful tool that empowers researchers to concentrate on substantive contributions, underscoring the significance of efficient source management in scholarly endeavors.

Furthermore, the paper serves as a practical guide for users, offering insights into handling various scenarios such as editing citation errors, incorporating secondary sources, and ensuring consistency between in-text and end-text citations. The discussion also brings attention to EndNote's ability to disambiguate works, automatically synchronize citations, and handle deletions and updates seamlessly.

In essence, this article bridges a research gap by providing a comprehensive exploration of the distinctive features that empower EndNote to systematically organize citations in accordance with APA (2020). My experiential journey, coupled with illustrative examples and screenshots, offers a nuanced understanding of EndNote's practical implications and benefits in academic writing.

As the contemporary academic writing landscape continues to evolve, citation management software like EndNote emerges as an indispensable tool for researchers, educators, and students alike. This research contributes to the growing body of knowledge on the subject, shedding light on the specific attributes that make EndNote an effective software in the pursuit of efficient source management and citation in scholarly endeavors.

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