

Siddhajyoti Interdisciplinary Journal (SIJ)

Vol. V, January 2024

(A Peer Reviewed Open Access Research Journal)

ISSN: 2645-8381

Published by Research Management Cell, Siddhajyoti Education Campus, Sindhuli

<https://www.nepjol.info/index.php/sij>

Achieving Accurate In-Text Citations with EndNote in Academic Writing

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Article History: *Received:* 30 June 2023; *Reviewed:* 30 November 2023; *Accepted:* 10 December 2023

Abstract

EndNote, alongside other citation management software programs like RefWorks, Mendeley, and Zotero, functions as a crucial instrument for archiving, structuring, accessing, and referencing sources in scholarly composition. This study delves into my personal experience of refining EndNote's default in-text citations across various reference types, for achieving accurate in-text citations adhering to the American Psychological Association (APA) style. To do so, I compiled my personal, albeit disjointed, experiences with refining the default in-text citation format sourced from the EndNote library. The findings are presented and discussed in a thematic manner, focusing on the in-text citation types and how they can be effectively managed within Microsoft (MS) Word documents. The findings ultimately affirm that EndNote's default in-text citations can be tailored to accurately cite a broader spectrum of citation types. This implies that judicious use of EndNote facilitates precise and systematic citations, with minimal manual adjustments. This consequently streamlines and accelerates the entirety of the course of academic writing.

Keywords: EndNote, EndNote library, APA style, default in-text citation, desired citation

Introduction

Citations play a crucial role in acknowledging the contributions of others to your scholarly work. They serve as a safeguard against both plagiarism and self-plagiarism in academic writing. The citation process consists of two essential elements: the concise citation in the text called in-text citation, and comprehensive end-text citation, also called reference citation (APA, 2010, 2020). This paper is specifically focused on the domain of EndNote's in-text citations. This involves the seamless integration of citations from the EndNote library into a document. The typical in-text citation through EndNote is delivered in the format of a "parenthetical citation," that can be skillfully customized using EndNote (APA, 2020, p. 262).

The present study delves deep into the art of refining default EndNote in-text citations to align seamlessly with the requirements of APA citation style, ensuring a harmonious congruence between in-text and end-text citations. The ultimate aim of the study is to achieve a perfect correspondence between in-text and end-text citations. At its core, the research problem revolves around devising effective strategies to adeptly adjust the default in-text

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Siddhajyoti Interdisciplinary Journal (Peer reviewed), Volume 5, January 2024

citation format, leading to precision and alignment with the intended purpose of the citation, contingent upon the unique characteristics of the source and its authors.

Thus, this paper endeavors to elucidate, employing a combination of annotated screenshots and detailed narratives, the technical maneuvers crucial for customizing default in-text citations from sources with varying author attributions. By doing so, it aims to cultivate a comprehensive understanding of the nuanced processes that facilitate the attainment of accurate and contextually fitting citations.

EndNote, a robust citation management software, strives to elevate the accuracy of citations. Based on my personal experience with EndNote, clearly, employing the EndNote library for all source citations significantly diminishes the chances of inconsistencies between citations within the text and in the references section. Nonetheless, even though EndNote serves as an invaluable tool for citation management, it may not be a universal remedy for all citation problems. Specifically, in the realm of in-text citations, the default format may not always be suitable. Achieving precise in-text citations across diverse contexts demands thoughtful modification of the default citation style.

The existing body of literature has offered limited insight into the necessary adjustments needed to customize EndNote's default in-text citation settings to align precisely with the citation standards of APA style in academic writing. Noteworthy contributions from Hensley (2011), Lonergan (2017), Lorenzetti and Ghali (2013), and Mendes, Silveira, and Galvão (2019) have delved into various aspects of citation management software programs, with a focus on their application, usability, and user preferences. In contrast, research efforts by Walker, Row, and Dolence (2007), Hupe (2019), Sherwin (2020), and Sharma (2022) primarily emphasize the attributes and importance of EndNote, they also offer essential guidance on its usage.

Furthermore, Sharma (2023a) and (Sharma, 2023b) provide comprehensive strategies for ensuring precise citation formatting in both APA 6th and 7th styles. This is achieved through strategic modifications to EndNote reference types and output styles. It is worth mentioning, though, that Sharma's emphasis primarily lies on end-text citations, with only a brief reference to in-text citations.

In contrast, supplementary materials provided by Agrawal (2009) and Clarivate Analytics (n.d.-a, n.d.-b) furnish more in-depth instructions on utilizing EndNote. Nonetheless, scant resources have addressed the crucial aspect of tailoring default in-text citations to ensure precise adherence to APA (2020) guidelines. This article endeavors to bridge this gap in the extant literature by comprehensively addressing the aforementioned issue.

This article, drawing from my personal encounters with EndNote, imparts insights that can be beneficial to a diverse audience, including academics, researchers, supervisors, librarians, EndNote trainers, and those new to its application. By recounting my own experiences, this article illuminates the process of crafting citations in academic writing, providing both a broad overview and specific exemplars. Its intent is to assist readers who possess familiarity with EndNote or are contemplating its adoption, delivering practical counsel on effectively managing citations, particularly within the domain of in-text referencing.

Methods and Procedures

This article aims to provide an in-depth exploration of my personal journey in customizing EndNote's default in-text citations to attain the precise and desired citation


format. To accomplish this, I adopted a research methodology that combines technical reflection with auto-phenomenology. At its essence, phenomenology aims to delve into the profound significance of commonplace occurrences (Vagle, 2018). In reflective phenomenology, established assumptions are temporarily put aside in order to concentrate on the immediate apprehension of the tangible aspects of the subject under investigation (Smith, Flowers, & Larkin, 2009). Reflective auto-phenomenology involves the meticulous dissection of the researcher's own firsthand encounters with the phenomena (Gorichanaz, 2017).

The present study offers an intimate account of my experience in customizing default in-text citations using the EndNote library. I meticulously detail the steps taken to ensure pinpoint accuracy, drawing from a range of resources including personal diaries, screenshots, and annotated EndNote citations. The paper is organized thematically, providing insight into my process of refining default in-text citations within specific contexts. Employing descriptive methods, I present findings through both written explanations and visual aids, offering practical strategies for adeptly modifying EndNote's default in-text citations to align seamlessly with APA citation style.

Results and Discussion

In my academic pursuits, particularly in dealing with journal articles and research reports, I recognized the importance of effectively managing and articulating my experiences in refining in-text citations. This aspect plays a crucial role in ensuring the integrity and credibility of my scholarly contributions. Consequently, I embarked on a deliberate and methodical journey of explication and interpretation.

This endeavor encompassed a meticulous process wherein I delved into the intricacies of wielding in-text citations. Through this process, I aimed to not only meet the standards of academic rigour but also to enhance the overall quality of my written works. By enhancing this skill, I sought to establish a solid foundation for sound and well-substantiated arguments, thereby contributing meaningfully to the discourse in my field of study. This journey ultimately became a testament to my commitment to scholarly excellence and effective communication in the academic realm.

To begin, my approach involved a meticulous selection of sources from the extensive database within EndNote, a widely adopted reference management tool. This was done with a deliberate strategy: placing the cursor precisely where I intended to insert the citation within my Word document. Following this, I seamlessly transitioned to the EndNote library interface, taking care to pinpoint the exact reference requiring citation. A critical moment arose when I activated the 'Insert Citation' function, easily accessible through the corresponding symbol '  ' in the toolbar of the EndNote library.

This apparently straightforward sequence of directives brought about in a dual achievement: the seamless integration of the in-text citation into the predetermined location in the text, and the subsequent generation of a comprehensive reference citation adhering to the specified citation style. However, the default form of these in-text citations presented an inherent limitation. They appeared as standardized constructs, adopting the format of (Author, Year) citations. While this format was generally suitable, it often proved inadequate and unsuitable in diverse contextual settings.

Subsequently, I dedicated myself to a series of trials and errors, showcasing my commitment to refining this pivotal aspect of scholarly communication. My journey of

refinement encompassed the customization of typical in-text citations for various source types and distinct author profiles. Guided by the esteemed APA style of academic writing, I navigated this transformative process.

The ensuing sections of my discourse elucidate my efforts in detail, delineating the intricate steps through which I meticulously tailored the in-text citations to mirror the diverse nature of the sources. This entailed adeptly maneuvering through a variety of scenarios and authorial attributions, ensuring that the resulting citations not only accurately represented the sources but also harmoniously aligned with the rigors of the APA style.

In essence, my journey of refining default in-text citations stands as a testament to the deliberate fusion of technological tools, methodological precision, and a dedicated commitment to academic excellence. It emphasizes the pivotal role that even seemingly minor elements, such as in-text citations, play in the comprehensive landscape of rigorous scholarly communication. Through my experiential narrative, I aspire to illuminate the path for fellow academicians navigating the intricate terrain of citation management within the realm of scholarly discourse.

Single-author source citation.

The parenthetical in-text citation for a single-author source in EndNote adheres to the APA 7th style, displaying in parentheses alongside its corresponding end-text citation as follows: (Peoples, 2021)

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

In order to comply with the requirement for a narrative in-text citation, I took the following steps to transform the original non-narrative citation:

1. Right-click on the non-narrative default citation.
2. Go to Edit Citation(s) in the displayed menu
3. Select Display As: Author (Year), as shown in the screenshot in Figure 1.

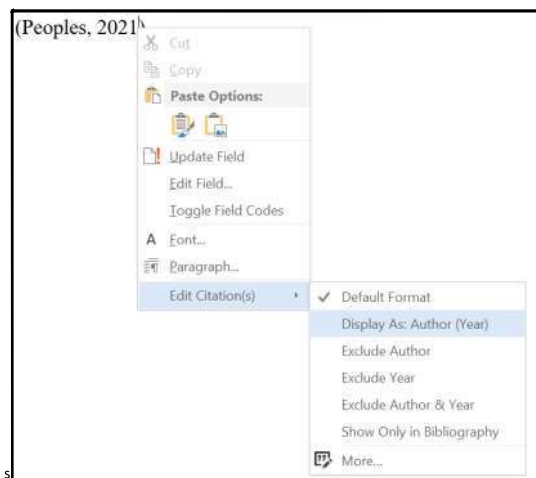


Figure 1. Transforming a narrative citation into a non-narrative format.

Executing these commands leads to the generation of a subjective narrative citation, exemplified by the format ‘Peoples (2021).’ This style of citation encapsulates a personalized approach to referencing within the text.

In order to switch from a subjective narrative citation, such as ‘Peoples’s (2021),’ to a possessive form within a context like ‘Peoples’s (2021) idea that . . . ,’ I proceeded by typing the possessive form of the author prior to its subjective form, resulting in ‘Peoples’s peoples (2021).’ Further adjustment was made by excluding the author using the following steps:

1. Right-click on the subjective narrative citation
2. Go to Edit Citation(s)
3. Select Exclude Author, as shown in Figure 2.

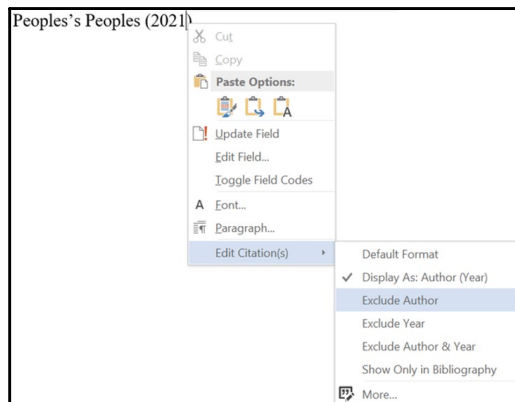


Figure 2. Transforming a subjective narrative citation into possessive form.

The operation depicted in Figure 2 successfully yielded the desired format for the in-text citation, ‘Peoples’s (2021).’

Citing a work with two authors.

In the EndNote default format, the in-text citation a work with two authors, along with its corresponding reference citation following APA 7th output style, is presented in parentheses, similar to the format used for single-author works. This can be illustrated as follows, for example: (Baker & Wright, 2017)

(Baker & Wright, 2017)

Baker, C., & Wright, W. E. (2017). *Foundations of bilingual education and bilingualism* (6th ed.). Multilingual Matters.

The transformation of the non-narrative in-text citation into a narrative format follows the same process for both one-author and two-author works. The primary distinction lies in the output. Specifically, in parenthetical citations, the two authors are linked by an ampersand (&), whereas in narrative citations, this is replaced by ‘and’ in accordance with APA (2020). This conversion is seamlessly handled by EndNote.

For instance, the parenthetical citation ‘(Baker & Wright, 2017)’ shifts to the narrative form ‘Baker and Wright (2017).’ To render it possessive, I added the possessive form before the citation, as in ‘Baker and Wright’s (Baker & Wright, 2017),’ and excluded the author’s

name via the Edit Citation(s) option. This resulted in the in-text citation reading ‘Baker and Wright’s (2017).’

Three-or-more-author work citation

In-text citations for works with three or more authors follow APA guidelines (APA, 2020), where only the first author’s surname is mentioned, followed by ‘et al.’ This citation process is effortlessly managed by EndNote. To illustrate, a standard in-text citation for a work authored by three individuals, along with its respective citation in the reference list adhering to APA 7th style, is exemplified below:

(Sharma, Karki, & Banjade, 2023)

Sharma, U. N., Karki, T. M., & Banjade, G. (2023). *Managing citations in academic writing using modified EndNote with reference to APA (Research-based information)*. Sunlight Publication.

Through EndNote, we have the capability to modify this citation into both subjective and possessive narrative forms, yielding ‘Sharma et al. (2023)’ and ‘Sharma et al.’s (2023)’ respectively. This process mirrors the approach outlined for one or two-author work citations mentioned in the preceding sub-sections.

Citing a work with a group author without abbreviation. For citing a work with a ‘group author,’ also known as a ‘corporate author’ within a text, it is recommended to fully spell out the group’s name as it appears in the source (APA, 2020). The group author is typically not abbreviated in the in-text citation, though it can be if it occurs at least three times in the work. If the full name is required in the in-text citation due to its occurrence less than three times, EndNote can generate the parenthetical citation format with the necessary information properly entered in the reference fields in the EndNote library. To ensure this, when entering the corporate author’s name into the Author field in the library, it should be followed by a comma (.). For instance, a default citation for a work by the American Psychological Association in APA 7th style would be as follows:

(American Psychological Association, 2010)

American Psychological Association. (2010). *Publication manual of the American Psychological Association* (6th ed.).

The in-text citation in the aforementioned example can be adjusted into either subjective or possessive narrative forms, just as with non-group author citations.

Citing a work by a group author with abbreviation. In instances where a group author’s name recurs three or more times in a work, abbreviation is permitted. If the complete name of the group author is introduced prior to its initial citation, subsequent in-text citations will be abbreviated. Conversely, if the group author’s name leads the in-text citation, the full name followed by the abbreviation within parentheses is provided. EndNote streamlines this process, generating the group author’s full name by default, e.g., ‘(American Psychological Association, 2020).’

In cases where the group author is introduced for the first time in a narrative citation, the full form is followed by the abbreviation in parentheses, placed before the publication year and separated by a comma. For instance, ‘American Psychological Association (APA, 2020)’ (see APA, 2020).

To ensure consistent formatting between the in-text and end-text citations, I manually entered the intended citation before its default counterpart: ‘American Psychological Association (APA, 2020) (American Psychological Association, 2020),’ excluding/omitting the author and year from the default citation, as illustrated in Figure 3.

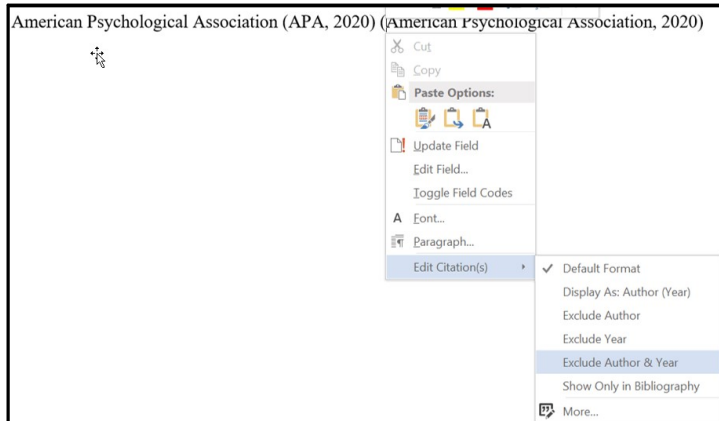


Figure 3. Narrative citation for a group author with abbreviation.

The procedure illustrated in Figure 3 yielded the intended citation format.

When the group author’s name is initially introduced in a parenthetical citation, it is presented in full form followed by its abbreviation in square brackets, and then followed by a comma and the year of publication, such as ‘(American Psychological Association [APA], 2020).’

This type of citation can be accomplished by adhering to the following steps:

1. Right-click on the default citation
2. Go to Edit Citation(s) in the drop-down menu
3. Click on More option, as shown in Figure 4.

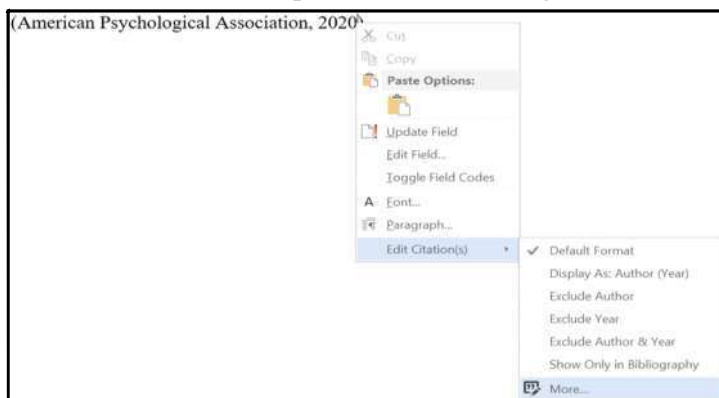


Figure 4. Abbreviated parenthetical citation for a group author’s work (initial step).

The process indicated in Figure 4 leads to the presentation as depicted in Figure 5.

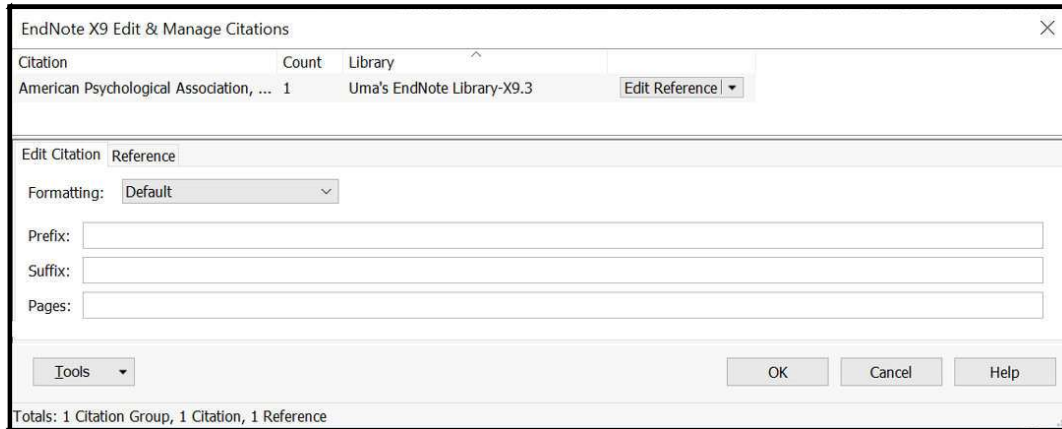


Figure 5. Abbreviated parenthetical citation for a group author’s work (second step)

Within the field display depicted in Figure 5, modify the Default formatting to Exclude Author. Then, input ‘American Psychological Association [APA]’ into the Prefix slot, mirroring the example visualized in Figure 6.

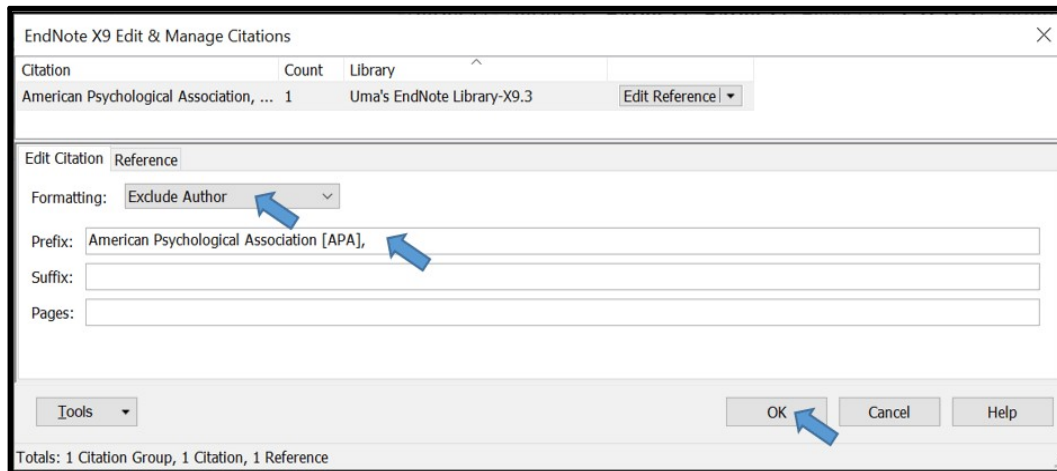


Figure 6. Abbreviated parenthetical citation for a group author’s work (third step).

Then, click on OK or press enter to get the desired citation as: ‘(American Psychological Association [APA], 2020).’

Subsequent in-text citations for a work with the same group author only require the abbreviated form (APA), e.g., (APA, 2020) in parenthetical or APA (2020) in narrative form. To generate ‘(APA, 2020)’ from ‘(American Psychological Association, 2020),’ follow these steps:

1. Right-click on the default citation
2. Go to Edit Citation(s) in the menu that appears
3. Click on More option.

The resulting display output will be visible as illustrated in Figure 7.

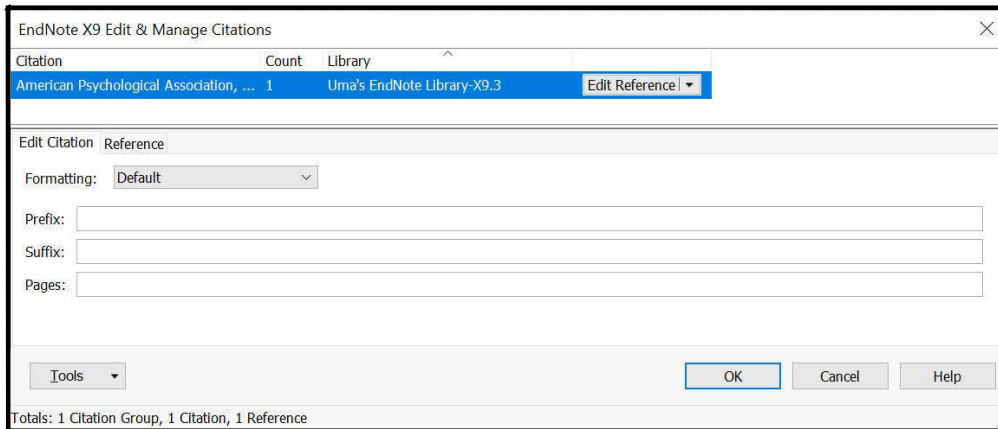


Figure 7. Abbreviated parenthetical citation for a group author's work (initial step).

Next, adjust the fields in the display by following these steps:

1. Replace Default formatting with Exclude Author.
2. Enter 'APA,' followed by a space, in the Prefix slot
3. Click on OK, as demonstrated in Figure 8.

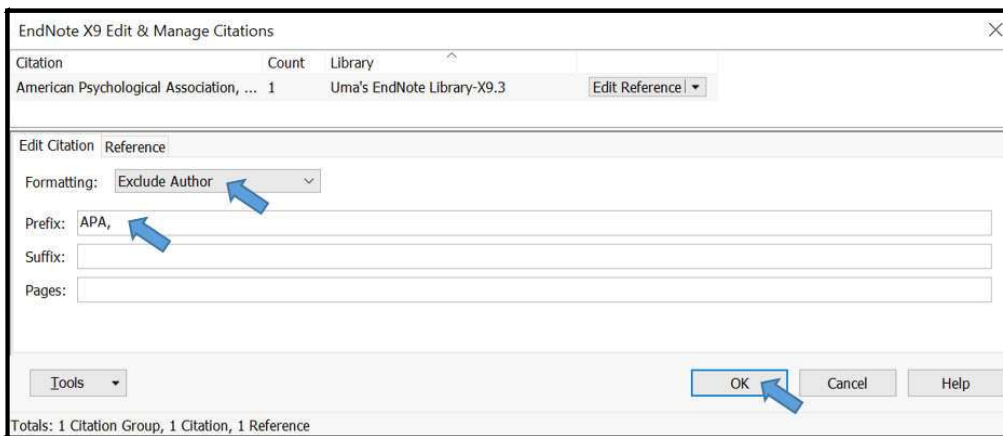


Figure 8. Abbreviated parenthetical citation for a group author's work (second step).

Note. There should be a space after the prefix 'APA,'

Click on OK or hit the enter key, and you will get '(APA, 2020).'

To obtain the citation as 'APA (2020),' omit the author from the default citation, which is 'American Psychological Association (2020),' and input 'APA' before the outcome.

Incorporating page number(s) in the citation Following the guidelines of APA (2010, 2020), we incorporate the author, year, and page number for a 'direct quotation'—which involves reproducing exact words from another source—in both parenthetical and narrative formats. Various methods exist for indicating the page number, and EndNote, in particular, appends the page number in the parenthetical citation.

To incorporate the page number in the parenthetical citation, such as '(Garcia, 2013),' we need to carry out the steps in the following sequence:

1. Right-click on the given parenthetical citation
2. Go to Edit Citation(s) in the appeared menu
3. Click on the option More, as shown in Figure 9.

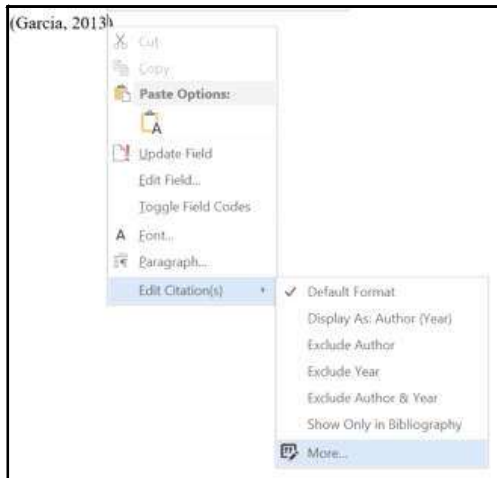


Figure 9. Including page number in parenthetical citation (initial step).

This process leads to the appearance of the dialog box depicted in Figure 10.

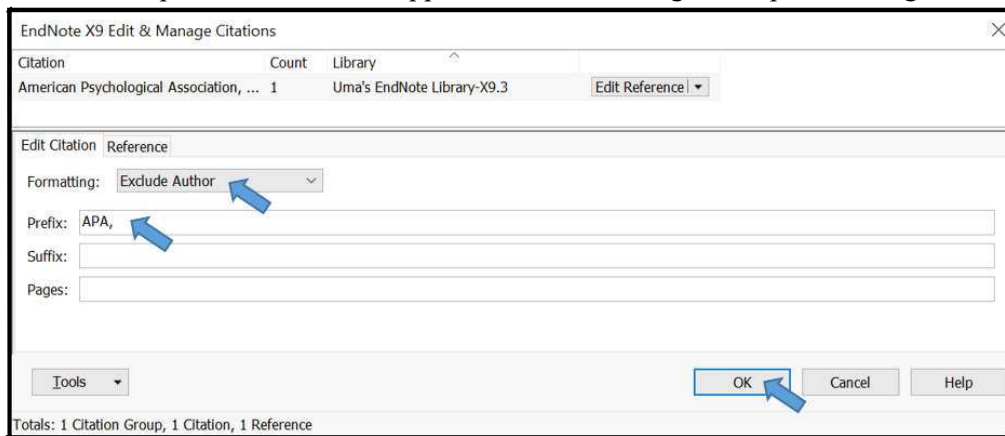


Figure 10. Including page number in parenthetical citation (second step).

Enter the page number of the quoted source (e.g., 31) in the designated field labeled 'Pages:' as demonstrated in Figure 11.

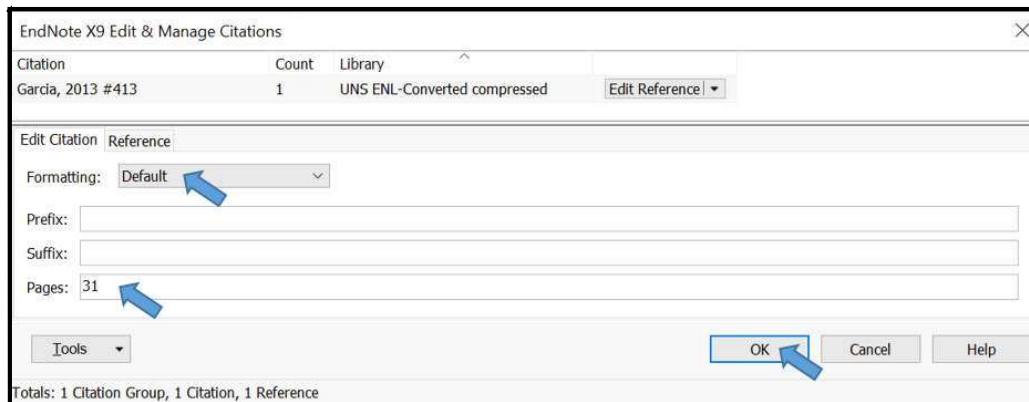


Figure 11. Including page number in parenthetical citation (third step).

Next, click on OK or hit the enter key to obtain the desired outcome, represented as (Garcia, 2013, p. 31). In case the cited quotation spans two or more pages, input both the starting and ending page numbers, separated by an ‘en dash’ (–), following the example illustrated in Figure 12.

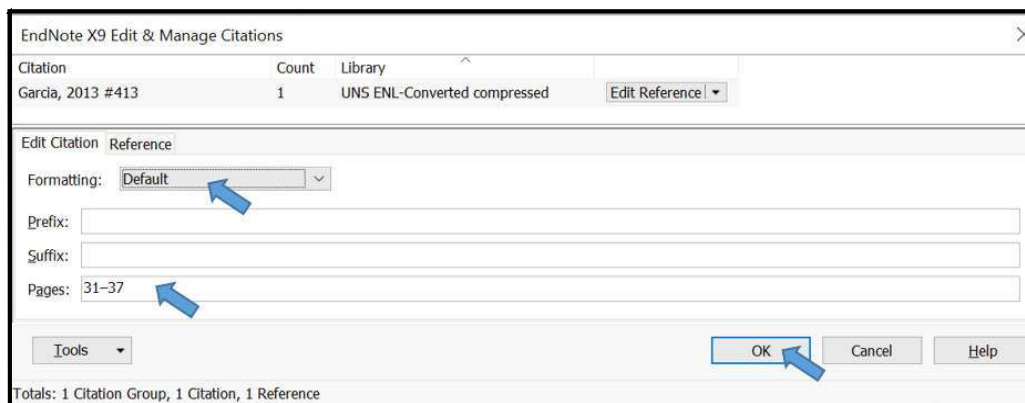


Figure 12. Including page numbers in parenthetical citation.

Next, click on OK or hit the enter key to generate the desired outcome: (Garcia, 2013, pp. 31–37).

In non-parenthetical citations, the page number is not provided alongside the publication year. In such cases, you will need to manually add the page number(s) at the end of the quoted text. For instance, according to APA (2020), “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” (p. 257). Additionally, for block quotations (i.e., quotations containing 40 or more words), when both the author and year are introduced earlier, the page number of the quotation is denoted at the conclusion of the quoted material. For instance, one may write: In APA’s (2020) words:

If a quotation contains 40 words or more, treat it as a block quotation. Do not use quotation marks to enclose a block quotation. Start a block quotation on a new line and indent the whole block 0.5 in. from the left margin. (p. 272)

It is worth noting that the page number for a block quotation is placed after the punctuation concluding it, and no period is required after the page number, as illustrated in the above example.

Citation with prefix and suffix Utilizing EndNote, researchers have the flexibility to incorporate prefix, suffix, or both elements within parenthetical in-text citations, tailoring them to specific scholarly needs. The prefix is positioned before the primary in-text citation, while the suffix follows it. For instance, consider the citation '(Friese, 2012).' To introduce the necessary prefix, suffix, or both, the following steps should be taken:

1. Right-click on its EndNote default citation
2. Go to Edit Citation(s) in the drop-down menu
3. Click on More, to get the display as shown in Figure 13.

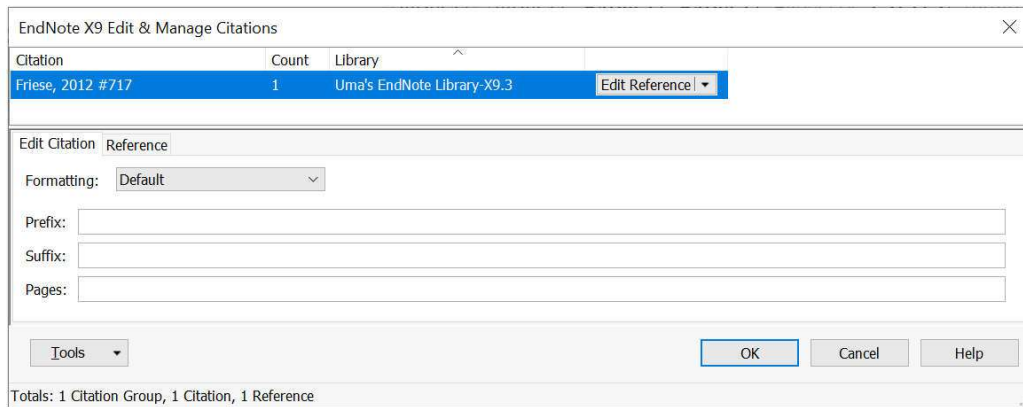


Figure 13. Including prefix and suffix elements in parenthetical citation (initial step).

Subsequently, input the prefix 'see' followed by a space into the designated Prefix field in the display in Figure 13. In the corresponding Suffix field, enter ', for details' (i.e., with the comma and space preceding 'for details'), as exemplified in Figure 14.

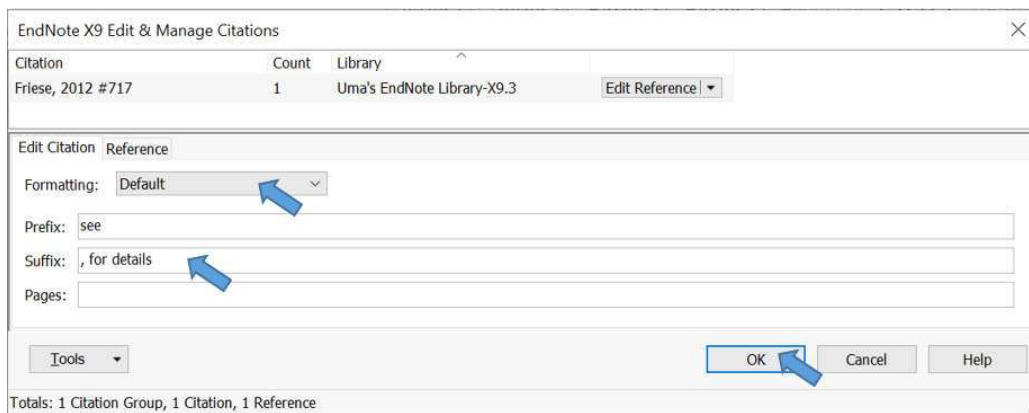


Figure 14. Including prefix and suffix elements in parenthetical citation (second step). Subsequently, select OK or press the Enter key to generate the outcome as '(see Friese, 2012, for details).' It is important to bear in mind that when entering the prefix in its respective

field, a single space should be appended at the end. Similarly, the suffix should be preceded by a comma followed by one space, mirroring the format depicted in the screenshot in Figure 14.

Secondary source citation According to APA guidelines (2020), it is recommended to “cite primary sources when possible and secondary sources sparingly” (p. 253). Achieving the desired secondary source citation involves editing the default citation of the relevant primary source. This entails employing the secondary source citation marker, namely ‘as cited in,’ as a prefix element within the default citation of the primary source. For instance, to create a parenthetical citation for McDonald’s concept as cited in Mickel (2016), for example, I append ‘MacDonald, 1993, as cited in ‘ as a prefix to the default parenthetical primary citation as shown in Figure 15.

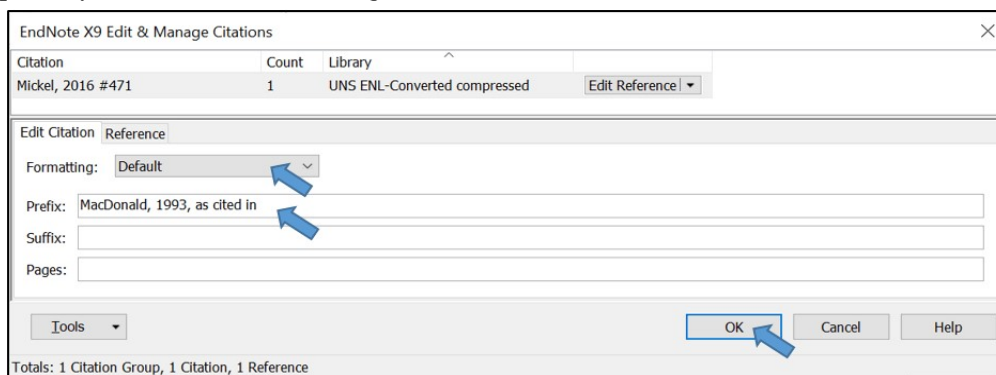


Figure 15. Achieving parenthetical citation of a secondary source.

Next, I clicked on OK to get the desired secondary citation ‘(MacDonald, 1993, as cited in Mickel, 2016).’

For managing a narrative citation of a secondary source, such as ‘MacDonald (1993; as cited in Mickel, 2016)’ you can manually place ‘van Manen’ before the citation ‘(Mickel, 2016).’ Additionally, incorporate ‘1993; as cited in ‘ as a prefix, as demonstrated in Figure 16. Afterwards, click on ‘OK’ or press ‘Enter,’ as exemplified in the same figure.

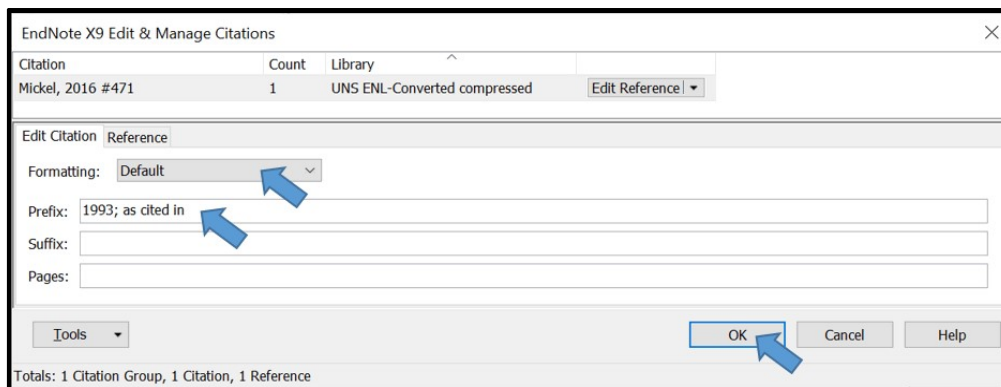


Figure 16. Achieving narrative citation of a secondary source.

Citation of webpage and newspaper or magazine article Achieving precise in-text citations for webpages, newspaper articles, and magazine articles requires a strategic approach. This

involves including the Year, Month, and Day of publication in the end-text citation, while in-text citations retain only the year, adhering to both APA (2010) and APA (2020). To ensure accuracy in both in-text and end-text citations, it is crucial to input information strategically into the corresponding fields in EndNote references.

For instance, while managing the reference of a newspaper article, one should select this reference type and input the relevant data into designated fields such as Reporter, Year, Title, Newspaper, Issue Date, URL, and, when applicable, Translated Title. This process can be mirrored based on the example demonstrated in Figure 17.

Reference Type: Newspaper Article

Reporter
Pokhrel, Uttam

Year
2018

Title
Angreji madhyamle pathan pathanma sudhar

Newspaper
Pradesh Portal

Issue Date
August 1

URL
<http://surl.li/jzrau>

Translated Title
Improvement in teaching learning activities due to EMI

Figure 17. Reference-field entries for newspaper article with URL.

Its EndNote default citation as per the APA 7th output style appears as:

(Pokhrel, 2018)
Pokhrel, U. (2018, August 1). Angreji madhyamle pathan pathanma sudhar [Improvement in teaching learning activities due to EMI]. *Pradesh Portal*. <http://surl.li/jzrau>

Likewise, to ensure a precise citation of a magazine article, it is essential to input the pertinent information into the designated fields: Author, Year, Title, Magazine, Issue Date, URL, and, if applicable, Translated Title, as illustrated in Figure 18.

Reference Type: Magazine Article

Author
Pangeni, Laxmi Prasad

Year
2018

Title
Samudayik bidhyalayama angreji madhyam bidhyarthile na angreji jane na nepali!

Magazine
Shikshak Masik

Issue Date
April 14

URL
<http://surl.li/jzqzv>

Translated Title
EMI in community school: Students learn neither English nor Nepali!

Figure 18. Reference-field entries for magazine article with URL

Its EndNote default citation as per the APA 7th output style appears as follows:

(Pangeni, 2018)

Pangeni, L. P. (2018, April 14). Samudayik bidhyalayama angreji madhyam bidhyarthile na angreji jane na nepali! [EMI in community school: Students learn neither English nor Nepali!]. *Shikshak Masik*. <http://surl.li/jzqzv>

Users have the flexibility to edit EndNote's default in-text citations for newspaper or magazine articles, just as they can for other reference types. Managing the in-text citation of a webpage follows a similar process to that of a newspaper or magazine article, with the exception of inputting the 'Last Update Date' in the reference field instead of an 'Issue Date.'

Conclusion

To conclude, the incorporation of EndNote into academic processes is immensely beneficial for precisely formatting citations according to APA guidelines. While certain citation types may require minor manual adjustments, the software's effectiveness is noteworthy. This highlights its significance in streamlining and perfecting the citation process, ultimately improving efficiency in scholarly writing.

Furthermore, the research findings underscore the importance of establishing a well-organized reference repository within the EndNote library as a fundamental prerequisite for any writing endeavor. This emphasizes the need for a thorough understanding of EndNote's functionalities, which significantly contributes to a seamless writing process and the creation of well-crafted academic documents.

The study's outcomes firmly establish that utilizing the EndNote library for citations not only expedites and refines the organization of academic writing but also assumes a nearly indispensable role, especially in projects involving a substantial volume of sources. The software's capacity to manage numerous references with accuracy and consistency significantly reduces the manual efforts required for such tasks.

The discussion, combined with personal experience and research insights, underscores EndNote's pivotal role in academic writing. Its proficiency in handling various citation types, despite occasional manual adjustments, solidifies its status as an essential tool for scholars. By streamlining the citation process, enhancing efficiency, and facilitating accurate referencing, EndNote not only proves advantageous but often becomes a necessity for maintaining the integrity and cohesiveness of works reliant on a substantial multitude of sources.

An inherent limitation in this study, possibly tied to the software itself, is the occasional need for manual adjustments with specific citation types, indicating that full automation in all instances might not be entirely attainable. Consequently, EndNote users may anticipate the pursuit of comprehensive citation automation through the software.

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