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From citation management to knowledge management : developing and implementing innovative endnote training and support services on the health sciences campus.

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FROM CITATION MANAGEMENT TO KNOWLEDGE MANAGEMENT: DEVELOPING AND IMPLEMENTING INNOVATIVE ENDNOTE TRAINING AND SUPPORT SERVICES ON THE HEALTH SCIENCES CAMPUS

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*I*n addition to providing basic and intermediate Endnote instruction and training , clinical librarians at the Kornhauser Health Sciences Library (KHSL) now offer faculty, physicians, researchers, and students individualized training and technical support via "EndNote Housecalls," assistance in the creation of specialized research libraries, library and bibliographic consultation and organization, and the delivery of patron-requested literature search results in customized EndNote Libraries via email. This paper will focus on the design and implementation of KHSL's EndNote citation management software training program, and its subsequent transformation into a service to address the knowledge management needs of our constituents.

ENDNOTE—AN INTRODUCTION

EndNote is a software tool for publishing and managing bibliographies on the Windows and Macintosh desktop platforms. The EndNote program also includes EndNote Web, a Web-based tool for managing and citing references that provides an online resource and environment designed to make it easy to collaborate with colleagues and students. EndNote users can organize references, PDFs, images and other files in electronic libraries; create custom groups, including smart groups that update automatically as references are added to a library; customize settings for the display of references and for bibliographic preferences; search and retrieve citations using EndNote's search engine; import citations from Internet databases and library catalogs; create instant bibliographies in Microsoft Word, Apple Pages, and OpenOffice.org Writer; find full- text articles automatically; use EndNote on a network drive and share libraries across mixed platforms; and create a limitless number of reference libraries of any size. Citation management software has emerged in recent years as an essential tool for students, scholars and researchers, and EndNote—with its consistency, stability, and constant enhancement—has become the industry standard software tool worldwide for publishing and managing bibliographies.

ENDNOTE AT U OF L

University of Louisville (UofL) librarians were the first group on campus to recognize the benefits of making citation management software available free to the University community. After a well-organized lobbying campaign led by reference librarians from the Ekstrom Library, the University administration purchased a site license for EndNote and Reference Manager (a similar citation management tool also manufactured by Thomson Reuters, the publisher of EndNote). The site license allows registered students, faculty and staff of the University to download personal copies of the software. Since the acquisition of the site license in 2005, EndNote programs have been downloaded and installed over 6,700 times. Data from the University's Information Technology department indicate a steady growth in the acquisition of the software from its servers over the last five years. However, we continue to seek new ways to market the program campus-wide and to integrate it into library work and course instruction and delivery.

The EndNote training program at the Kornhauser Health Sciences Library (KHSL) on UofL's medical campus began in 2005 with two librarians, Judy Wulff and John Chenault, providing a series of one-hour lecture-demos that covered the basic features and uses of EndNote and Reference Manager. Classes were offered once a month each semester for audiences composed of a diverse mix of faculty, students and staff. Initially our in-house library classes ranged between 20-25 persons

per session. Three years ago, however, we gained access to a computer lab that provided better facilities for instruction but limited class size to no more than 12 participants per session. My colleague Judy Wulff taught Reference Manager and I taught EndNote within the same scheduled classes. We tried this team-teaching approach of providing back-to-back presentations to give our patrons the opportunity to choose which program they thought would best meet their citation management needs. Since we were far from being experts in citation management at the time, our sessions were more marketing and demonstration in design and content than they were instruction and training. In hindsight, however, it was not the best way to introduce Reference Manager and EndNote to our clients. We failed to consider the confusion this caused some of our patrons, and the fact that others simply would have preferred for us to tell them which program we thought was best. Frankly, at that time, we didn't know if one program was better than the other or if we should be more assertive with our clientele and simply promote one package over the other. Among our foremost concerns was getting patrons to install and use the software. It had taken a considerable effort to get the site license, and we wanted to generate immediate awareness about the software programs and their availability on campus to help justify the University's investment.

Once we incorporated citation management courses into the regular schedule of library classes, people on campus who were already users of the two programs began to contact us. Some referred colleagues to us for training. Others wanted refresher courses or needed assistance in using the programs for various projects. Moreover, as the numbers of "graduates" of our class sessions increased and the campus grapevine began to buzz from the word-of-mouth reviews and feedback from new users, requests for more comprehensive instruction and for technical support increased dramatically. This was not an unexpected result but a hoped for and planned for eventuality. We knew as more and more people attended our sessions, we were creating in effect a group of users who would turn to the library for additional support. Increased demands from our constituents for advanced instruction, problem-solving, and technical help meant the allocation of additional staff time to support citation management training in the library, and also required us to upgrade our skills and develop

new ways to provide services. We worked to address these issues and needs as quickly as possible. We had created a demand for service and certain service expectations and we were determined to meet our obligations.

We achieved some limited success increasing our skill sets and knowledge base through our own initiatives. In my particular case, I used EndNote to write a graduate thesis in Pan African Studies. That experience proved invaluable for me. The thesis provided a major project for me to work on that helped me evolve from a more or less abstract and theoretical understanding of the software program and its tools to an experiential knowledge of its applications and its limitations. In the long run, however, we only advanced so far on our own. Ultimately, we sought help from EndNote via a site visit from an EndNote trainer. In addition to providing intermediate and advanced classes for EndNote users on our main and medical campuses, we also arranged for the trainer to assist us in improving our knowledge base and pedagogy. Her campus visits and workshops over the past few years have proved invaluable to our training program for our patrons and to us as instructors. From those encounters we also learned about new features and about forthcoming enhancements and improvements in future iterations of the software.

After a semester of offering combined Reference Manager/EndNote classes, we severed the two courses from each other. A number of factors went into this decision: we needed more time to cover the functions and features of each software program, and the demands for EndNote instruction, in particular, were outpacing requests for Reference Manager training. EndNote itself also factored into the decision. As EndNote underwent routine annual upgrades with new exciting features added each time, it quickly became apparent that Reference Manager was not receiving the same level of research and development. Eventually we dropped Reference Manager from our course schedule and focused only on EndNote. However, we still have many Reference Manager users on campus who occasionally call on us to answer questions and troubleshoot problems and issues.

ADDITIONAL BENEFITS TO THE LIBRARY
Our strategy for teaching EndNote and incorporating it into our schedule of library classes produced additional benefits. Like many

libraries around the country we are experiencing a decline in the numbers of service contacts occurring every month. Much of this is driven by technological changes that have altered the way our constituents search for and retrieve information. EndNote training has generated new enthusiasm and excitement about library services and the central role of the library as a learning resource on campus. It brings patrons into the library for training and increases their use of the library's electronic resources from off-campus. And the nature and design of EndNote, its general purpose, and the manner in which it connects to and interfaces with library catalogs and databases, furnish opportunities to improve the general information literacy skills of our constituents. Clients learn about the many databases available to them via the library, the various ways to locate and retrieve full-text articles, the purpose and structure of bibliographic citations, and how to use and manage bibliographic styles. Additionally, via EndNote classes, we provide our patrons with a general orientation to library facilities and services and recruit them to enroll in various other library courses and workshops. EndNote classes thus have become a kind of feeder for us and an entry point for our patrons to acquire database searching and research skills. Moreover, the completion of the training often leads our clients to become more active users of the interlibrary loan, document delivery, and literature search services available to them. The marketing of EndNote also occurs in the classes we offer on PubMed, Ovid, Cinhal/EBSCO, Science Databases, Social Science Databases, Publishing Process, and the ever-popular Beyond Google (Advanced Google, Google Scholar, Google Images). Upon completion of those courses, we encourage clients to sign up for EndNote instruction as the endpoint of the library research training process and the beginning of the manuscript and bibliographic preparation phase.

CURRENT STRUCTURE

With the above overview of our nascent period in mind, we will now examine briefly the current structure of KHSL's EndNote classes and new EndNote services that have been implemented over the past few years. As stated above, improvements in EndNote software directly influenced changes in our EndNote teaching strategy and methodology. EndNote 7 was the current version of the software when we got our site license and established our course schedule in 2005. Since then Thomson

Reuters has upgraded the software and incorporated new features on a regular basis. In the summer of 2010 version X4 was released. New features appeared with the issuance of each upgrade of the software. During the past five years EndNote added "Groups" and "Smart Groups" to improve the organization and management of citations; a "Find-Full-Text" tool that enables the retrieval and importation of PDFs in batches from subscribed databases; improved emailing features to share libraries and groups with colleagues; EndNote Web, a web-based program that simplifies collaboration; and an import tool that enables the direct importation of DOI embedded PDFs individually and in folders, using a method that extracts the basic bibliographic information from each document. These improvements led us to expand our introduction to EndNote class from one hour to ninety minutes, as we needed additional time to encompass these new features in our presentations. The outline of our current "Introduction to EndNote" course follows:

1. Overview of the functions of EndNote
2. EndNote requirements (Windows & Mac)
3. Word Processor Compatibility
4. Downloading and Installation
5. Customizing the EndNote Installation
6. Creating and Adding References to an EndNote Library
7. Customizing EndNote Preferences
8. Manually Entering References
9. Using EndNote's Connection Files, Import Filters, and Output Styles
10. Searching an Online Database from within EndNote
11. Importing References from an Online Database or Catalog
12. Exporting References to EndNote from an Online Database
13. Creating and Managing Groups
14. Using EndNote's "Find Full-Text Tools"
15. Configuring and Using OpenURL to Connect to the Library
16. Attaching PDFs, Images, Charts, and Tables
17. Configuring EndNote Web
18. Emailing Compressed Libraries
19. Updating EndNote and Using Online Help
20. Using Cite-While-You-Write Tools in Word

"ENDNOTE HOUSECALLS"

Other services also were created to bring the training directly to our clients. As part of our plan to address the declining number of

8

patrons coming into the library for reference assistance, we developed a clinical librarian program designed to take the library to our constituents. KHSL librarians attend Morning Reports in various affiliated hospitals, attend and participate in Grand Rounds, support Journal Clubs, and provide workshops and training sessions to various groups and departments in our medical, dental, nursing, and public health schools. EndNote instruction has followed this path and gone a step further in providing individualized instruction sessions specifically designed to meet the scheduling needs of clinicians, department heads, and researchers. This service, which we have dubbed "EndNote Housecalls" in keeping with the culture of our medical school environment, is immensely popular and has enabled us to establish positive working relationships with our diverse clientele across all sectors of the medical campus. As a result of our outreach efforts, we also are invited to participate in orientations for new students, residents, and fellows every year, and to provide instruction to special groups within the medical campus community.

CAVEATS

This article focuses on the development of the EndNote training regimen at the KHSL on the University of Louisville medical campus. However, it is also important to note issues related to EndNote's performance. A recent literature search of EndNote articles published over the past seven years retrieved a handful of research studies that examined the reliability of the software's online search tools (Fitzgibbons and Meert); compared citation formats in EndNote and Reference Manager with citation formats found in the author instructions in top medical journals (Gall and Brahmi); compared EndNote to web-based bibliography composers like NoodleBib and EasyBib (Kessler and Van Ullen); and analyzed EndNote's search results compared to results acquired by searching MEDLINE directly via Ovid and PubMed (Gomis, Gall and Brahmi). Each of these articles raises important issues about EndNote's performance, and suggests caveats that should be considered in teaching and using EndNote software. One of the most important issues to emerge from this literature review is that results of searches will vary based on the database used and the techniques used to conduct the search. While Thomson Reuters, the publisher of EndNote, touts its 3,900 pre-defined connection styles and the ease with which

search engine can retrieve bibliographic references, as EndNote instructors we have always stressed to our clients the importance of conducting literature searches in the appropriate databases and exporting the results to EndNote. Our reasons for doing so are twofold. First, as part of our mission as clinical and research librarians we want to encourage and train our clients, whenever possible, to develop good search strategies. This requires them to conduct their literature searches directly within the electronic databases appropriate to their information needs. Second, we know that EndNote is offering a generic search tool designed to interface with a multitude of databases. Consequently, it lacks the tools, refinements, and optimizations of dedicated search engines that have been designed to interface with specific electronic repositories. In medical and scientific disciplines precision and specificity in recall and retrieval are of the utmost importance. Therefore the best outcomes are more likely when not using EndNote to conduct literature searches. On the other hand, we also instruct our clients when it is appropriate, in our opinion, to use EndNote's search tools. EndNote's searching capabilities are more than adequate when the particular citation is a known entity to the searcher, or when using any of the thousands of college catalog connection files to retrieve citations for books, DVDs, or other media. In our training sessions we demonstrate how to conduct searches using Ovid, PubMed, EBSCO, and other databases and export the results to EndNote. By these means we make sure our clients understand what we consider to be the "best practices" for conducting literature searches.

The manner in which EndNote complies and comports with the Author Instructions for various publications, and handles their bibliographic styles and formatting requirements, is also a matter of some concern. Many of our requests for assistance involve problems and issues patrons have encountered related to manuscript preparation, and particularly the output of bibliographic styles and the creation of bibliographies. EndNote is supposed to remove the hassles related to those tasks. Situations that challenge its bibliographic output tools and resources, however, often require users to expend valuable time troubleshooting and problem solving complex bibliographic issues. The publisher of EndNote notes the limitations of the software in handling certain requirements in certain biblio-

graphic styles (APA and MLA, among others), but the average user often has difficulty finding the information or methods needed to resolve those problems. Again, we address those issues and concerns during the training sessions to make our clients aware they must always be vigilant when using the software's cite-while-you-write features, and that they and not EndNote are responsible for the final product. *Proofread … proofread … proofread*, is our mantra.

ENDNOTE LIBRARY IS CREATED

Two recent articles discuss new ways to use EndNote to improve productivity and efficiency. It is now possible to use the Firefox and Internet Explorer web browsers to facilitate the direct export of references from PubMed to EndNote (London, Gurdal and Gall). And EndNote has been recommended as a tool to harvest contents metadata for bibliographic enhancement for catalogers adding content notes to WorldCat (Chang and Culbertson). Three years ago at KHSL, I also came up with a novel way of using EndNote. A major part of our routine as clinical librarians consists of conducting literature searches upon request from our clients. Requests can be made in-person at the Reference Desk, via telephone conferencing, and via the Ask-a-Librarian electronic request form sent to us from patrons by email. The usual response to such requests involves sending search results via email directly to a patron from the database (PubMed, Ovid, etc.) where the search was conducted. Upon receiving an html-formatted list the patron then would use the links to return to the database and read the articles' abstracts and use our embedded "Find-it-at-UofL" button (link out tool) to determine if we subscribed to the document and to access the PDF if the desired item was available in electronic format. I realized that EndNote could be used to expedite this process for our clients. I contacted a patron in our Internal Medicine Department with whom I had a long-term working relationship and asked if she would be willing to receive the literature search I had done for her delivered via email in an EndNote library. With

her consent I created a new EndNote library, exported the results list directly to it, used its "compressed library" email tool to create a file that could be attached to an email, and delivered the results. The process worked perfectly. The fact that the bibliographic record for each citation generally includes an abstract for the article enabled her to determine the relevance of an item, if any, to her research. Once she decided on the articles she wanted, she could use the software's "Find Full-Text" tool to retrieve PDFs in batches or the OpenUrl link to request document delivery of print items in electronic format. She also could use the OpenURL link tool to request items to which we did not subscribe directly from our Interlibrary Loan Department. Most important, her bibliographic citations were immediately ready for output to her manuscript in any output style she required. Since its introduction this method of delivering literature search results has become immensely popular with our EndNote users, and all the librarians in our reference department have started using it.

ENDNOTE: FROM CITATION MANAGEMENT TO KNOWLEDGE MANAGEMENT

These innovative uses of EndNote, and the software's ability to create an unlimited number of libraries of any size, provide the opportunity to move beyond the basic citation management concept of EndNote and to re-conceptualize it as a tool for Knowledge Management. The ability to construct an electronic library of full-text articles and to organize the contents of that library into subsets of literature (customized groups) for ease of access transforms the work habits of students and scholars, increases their knowledge of scholarly literature, and improves their efficiency and productivity in conducting research and publishing their works. It is with these ideas in mind that we will continue to explore new and unique ways to employ EndNote to meet the needs of our patrons and clients.

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