

# EndNote XI

## Introductory guide



### What this introductory guide will enable you to do:

Manage information using EndNote software by:

- Creating a database (EndNote library) of references
- Searching and downloading references from databases and catalogues
- Searching *EndNote* libraries
- Generating citations and bibliographies in specific styles

## What is EndNote?

EndNote is a bibliographic management tool that allows you to save, organise and use references found from a variety of sources. Using EndNote you can:

- create a database (library) of references
- search and download references from electronic databases and library catalogues
- generate citations and bibliographies in specific styles

The University of Tasmania has purchased an institution-wide license to the software that allows all current staff and students to use the software.

Download the software from the Library EndNote page at <http://www.utas.edu.au/library/assist/apps/endnote/>

Endnote XI is the latest version that is supported by the University Library. However, version 9 is still available for download.

The purpose of this guide is to outline the most basic functions of EndNote XI for the beginner. Please use the complete EndNote XI manual (796 pages long) as the authoritative guide (manual available online and also comes with your Endnote software at **C:\Program Files\EndNote X1\Endnote.pdf**).

<b>1. EndNote Libraries .....</b>	<b>3</b>
1.1 Create a new EndNote library .....	3
1.2 Open an existing EndNote library.....	3
1.3 Transfer records between EndNote libraries.....	3
<b>2. Enter references manually .....</b>	<b>4</b>
<b>2.1 Create a new reference .....</b>	<b>4</b>
2.2 Author entry guide .....	4
2.3 Accuracy.....	5
<b>3. Direct export to EndNote.....</b>	<b>5</b>
3.1 Example: Direct export from Web of Knowledge databases.....	5
<b>4. Import database records (references) into EndNote using filters.....</b>	<b>7</b>
4.1 Example using Biological Sciences database via CSA.....	7
4.2 About filters.....	8
<b>5. Search within your EndNote library .....</b>	<b>9</b>
<b>6. Groups .....</b>	<b>9</b>
6.1 How to create a custom group: .....	9
<b>7. Search library catalogues through EndNote .....</b>	<b>10</b>
7.1 Example: Search the University of Tasmania Library catalogue .....	10
<b>8. Citing References and formatting bibliographies using Microsoft Word .....</b>	<b>13</b>
8.1 Selecting an output style .....	13
8.2 Displaying the EndNote toolbar in Word .....	13
8.3 How to insert citations in a Word document.....	13
8.4 Altering an in-text citation using Edit citation.....	14
8.5 Turn off Cite While You Write .....	14
8.6 Formatting the bibliography.....	15
8.7 Creating an "independent" bibliography using drag-and-drop .....	16
<b>9. Help and problem solving .....</b>	<b>16</b>
9.1 Local help .....	16
9.2 Other sources of help and information .....	16

## 1. EndNote Libraries

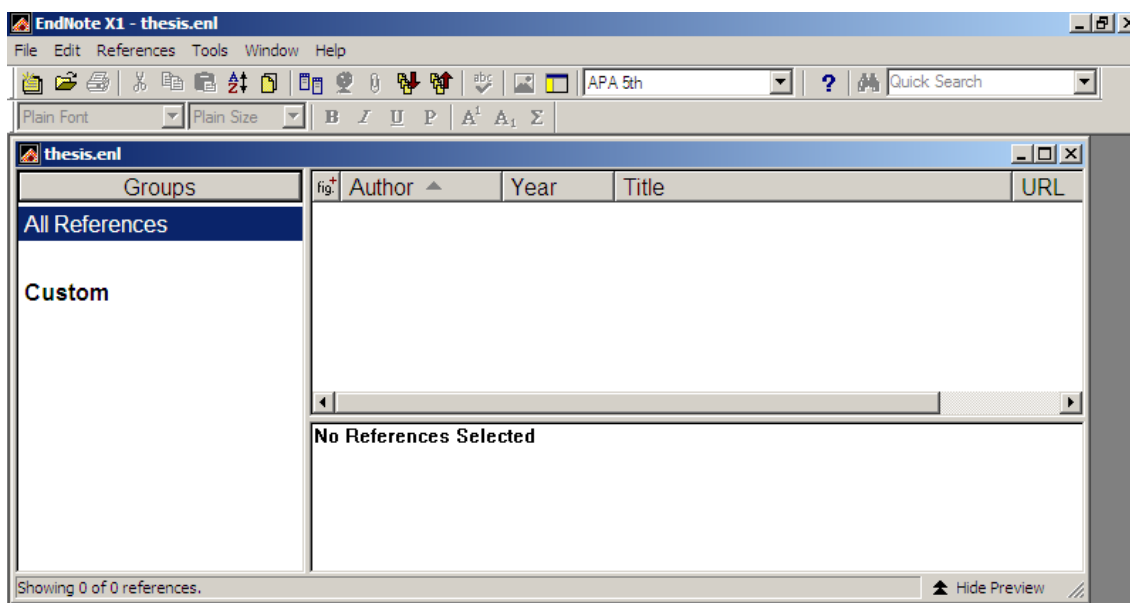
### 1.1 Create a new EndNote library

- Open EndNote
- From the **File** menu, select **New**

A dialogue box opens, headed **New reference library**

- Select drive/directory/folder where you want to save the library
- Name and save the library file (it will have the extension **.enl**)
- **Important!** Remember to 'back up' your library!

**Please note:** A **.Data** folder will be automatically created when you create a new EndNote library. It will have the same name as your library with a **.Data** extension. This folder is part of the library, and any images or files you insert into your library will be stored in the **.Data** folder. Make sure you back up the **.Data** folder when you back up your library, the **.Data** folder is located in the same folder as your library.



### 1.2 Open an existing EndNote library

Once the library has been created and saved, EndNote will remember that the library exists.

To open an existing library

- From the **File** menu, select **Open**

The saved library's file name should be displayed in the submenu.

If the library is not displayed, select **Open Library** and locate the library file on your computer.

#### Set your library to open automatically when EndNote starts

- Open the library or libraries you would like to open automatically
- From the Edit menu, select **Preferences**
- In the left side of the EndNote Preferences window, click on **Libraries**
- Click on the **Add Open Libraries** button to add all open libraries to the list
- Click on OK

### 1.3 Transfer records between EndNote libraries

More than one library can be opened and references transferred between them.

- Open libraries
- From the **Window** menu, select **Tile**
- Use Ctrl/mouse click to select the items that you want to transfer from the source library
- Holding down mouse button, drag-and-drop the selected references into the target library

## 2. Enter references manually

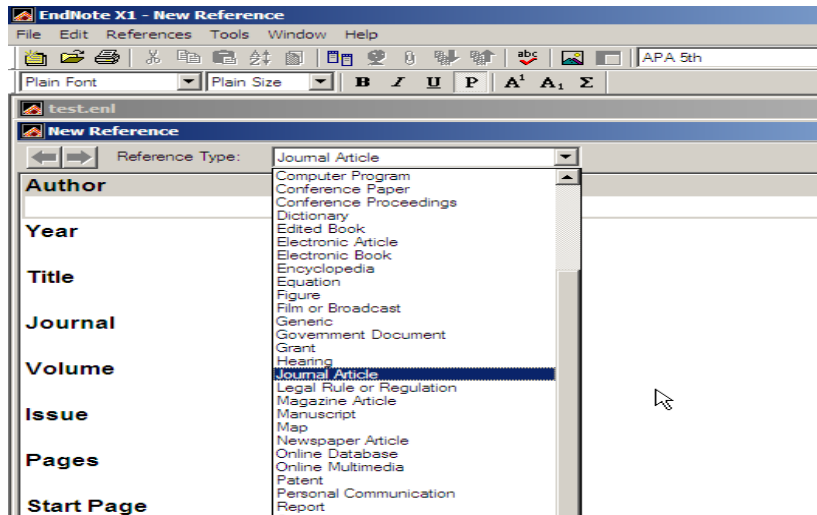
### 2.1 Create a new reference

With the relevant library open...

- From the **References** menu, select **New Reference**

A **New Reference** window opens ready for data entry

- Select the appropriate reference type from the drop-down menu (book, journal article, thesis etc)
- Enter data as appropriate
- Closing the window will automatically save the record to the open library



### 2.2 Author entry guide

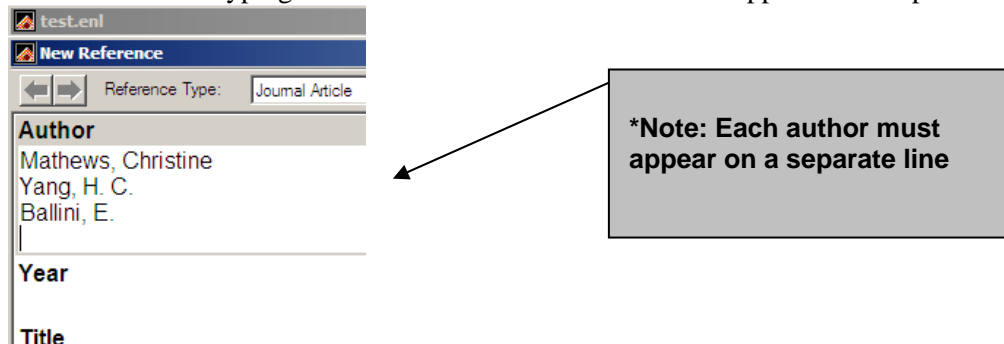
#### Authors

There is more than one way of entering author names

- type family name first, followed by a comma and then the given name, eg *Mathews, Christine*
- type the given name followed by the family name, eg *Christine Mathews*.
- separate initials with a space or full stop, eg *Mathews, C.O.* or *Mathews, C O*

#### For more than one author

Press **Enter** after typing an author's name so that each author appears on a separate line.



#### For Corporate authors

Put a **comma** after the name when entering corporate authors.

In the Author field Endnote interprets all text before a comma as a last name, eg *Apple Computer Inc.,*

## 2.3 Accuracy

It is important to ensure that the data in fields that are likely to appear in a reference are entered accurately and in the correct format. For a journal article these fields include the Author, Year (4-digit), Title (full article title), Journal (journal title), Alternative Journal (standard abbreviation of journal title), Volume, Issue and Pages.

## 3. Direct export to EndNote

Many databases allow marked records to be exported directly from the database into your EndNote library.

Some of these databases include:

- SCOPUS
- Web of Knowledge (Web of Science, CAB Abstracts, INSPEC, Current Contents etc)
- Science Direct
- GEOBASE via Engineering Village
- Informit databases (eg. A+Education, APA-Fulltext etc)
- Ebsco databases (eg. Business Source Premier; CINAHL)
- CrossSearch
- IEEE Xplore

### 3.1 Example: Direct export from Web of Knowledge databases

Conduct your search in a Web of Knowledge database.

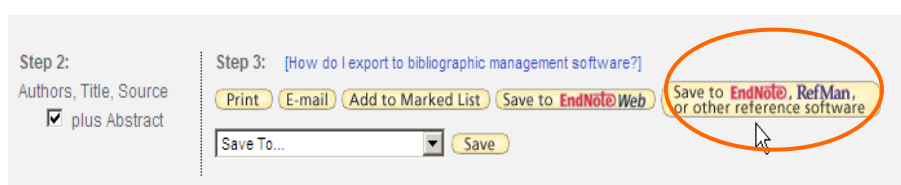
There are two methods of exporting records in Web of Knowledge databases.

#### Option 1 (To export records page by page)

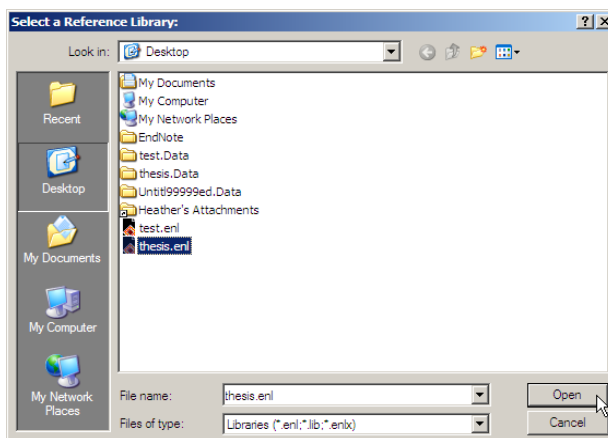
- Perform a search within a **Web of Knowledge** database.
- Mark the records you require



- Then click on “**more options**” to view the Endnote export options



- EndNote will present a **Select a Reference Library** dialogue box. Select your library and click **Open** (you must do this even when your library is already open)

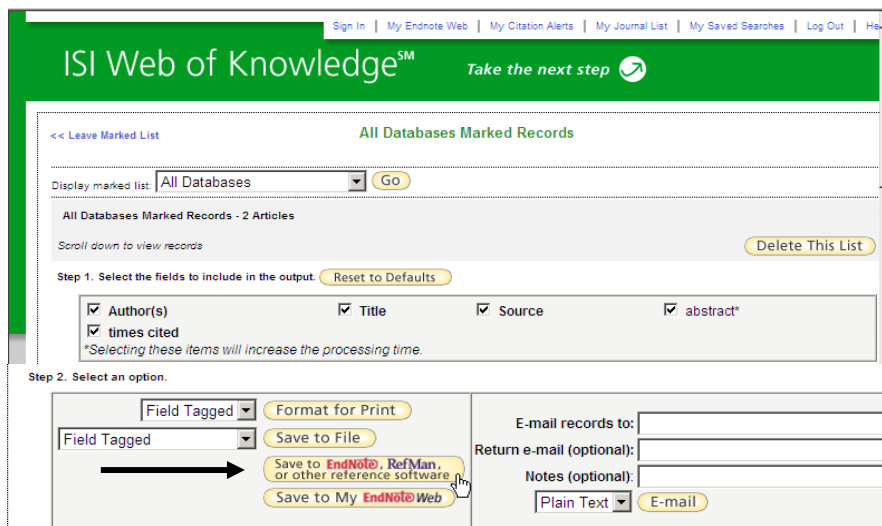


Your database records should now be displayed in EndNote.

### Option 2 (To export records from various results pages using the MARKED LIST)

- Perform a search within a **Web of Knowledge** database.
- Mark the records you require
- Click on **ADD TO MARKED LIST**
- Click on **MARKED LIST**

On the **Marked Records** page



- Select the fields you want downloaded into your EndNote library.
  - Click on the **SAVE TO REFERENCE SOFTWARE** button.
- EndNote will present a **Select a Reference Library** dialogue box

- Select your library and click **Open** (you must do this even when your library is already open)
- Your database records should now be displayed in EndNote. Click on “All References” to show all.

Imported references are now displayed. Check the individual references to ensure data has been imported correctly. Minor corrections can be made by **cut** and **paste**.

#### 4. Import database records (references) into EndNote using filters

It is important to note the name of the database that you are using and the name of the provider of the database. For example Biological Sciences is the name of a database provided by Cambridge Scientific Abstracts (CSA). PubMed is another example of a database which uses an import filter.

Some databases requiring the use of filters include:

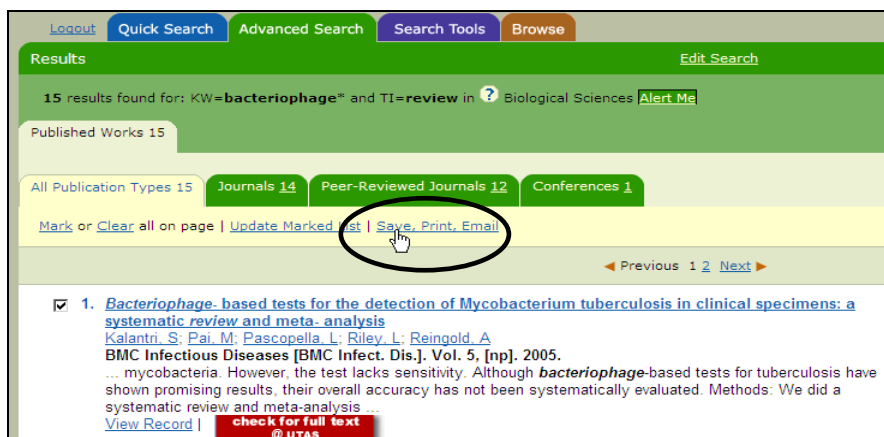
- Biological Sciences via CSA
- GeoRef via CSA
- EconLit via CSA
- ASFA via CSA
- PsycINFO via CSA
- Sociological Abstracts via CSA
- ERIC via CSA
- SciFinder Scholar (CAS)
- PubMed (NLM) [in PubMed, first change the Display options to MEDLINE then Save to..File]

The procedure for importing records may vary depending on the specific database. The basic steps are always:

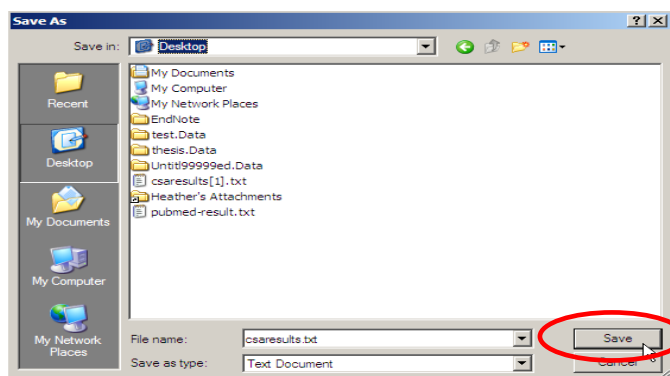
1. **Select** the records from the database
2. **Save** these records as a **text (.txt)** file
3. Import from within Endnote using correct filter

#### 4.1 Example using Biological Sciences database via CSA

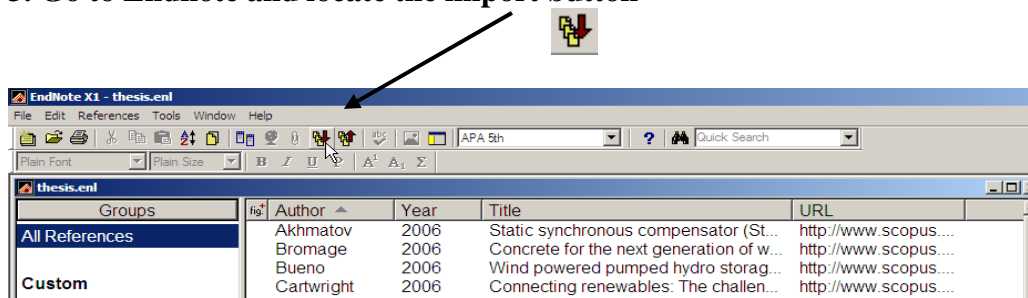
##### 1. Select the records from the database:



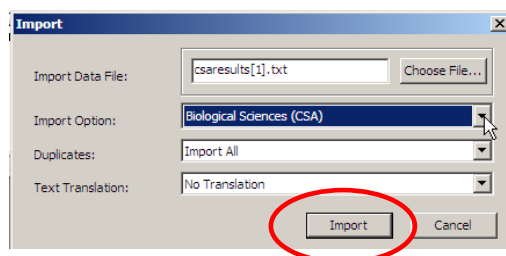
##### 2. Save the marked results as a .text file



### 3. Go to Endnote and locate the import button



Import the file into your EndNote library using an **appropriate filter** for the specific database



Choose the correct filter from the list of "other filters"

Imported references are now displayed in the Endnote library. Check the individual references to ensure data has been imported correctly. Minor corrections can be made by **cut** and **paste**.

- To see all the references in the EndNote library:  
Click on **All References** in Group pane to the left of the screen.

#### 4.2 About filters

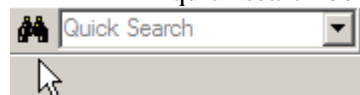
EndNote Import Filters are used in the process of importing database search results into EndNote. A filter interprets each piece of text within the fields of a record and places it in the correct EndNote library field. To successfully import records from a saved database search into EndNote, the correct filter is required.

The EndNote software that you download comes with filters for some databases from a variety of providers. See the Library EndNote filters page for filters for databases subscribed to by the Library: <http://www.utas.edu.au/library/assist/apps/endnote/enfilters.html>

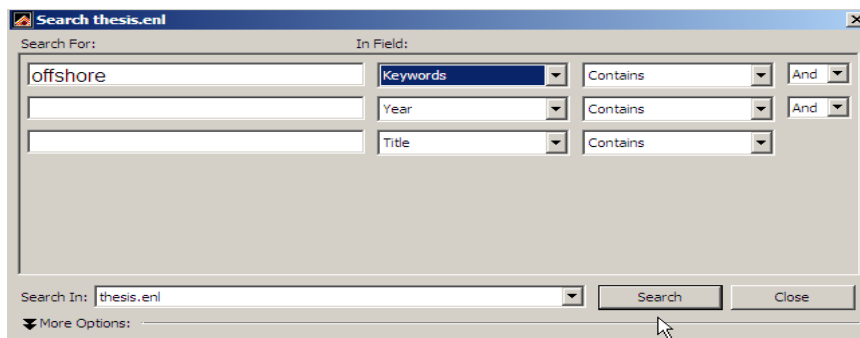
Filters are not required when a database offers Direct Export (see *Section 3* Direct export to EndNote).

## 5. Search within your EndNote library

- Open the EndNote library that you wish to search  
Click on the Search button on the top right corner toolbar OR type the word directly into the quick search box



- A search window will appear enabling you to search the open library.



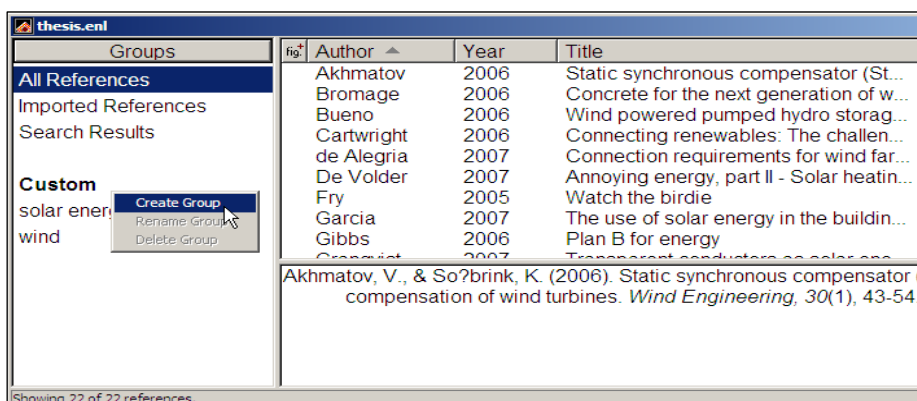
## 6. Groups

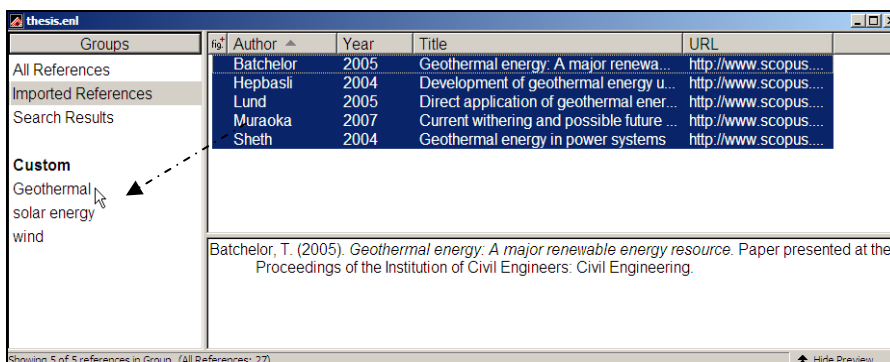
- Groups are a new feature of Endnote X1.
- Groups make it easy to break a large library into subsets for later viewing

There are two types of groups. Automatically generated groups include *All References*, *Search Results*, *Imported References* and *transferred References*. Custom groups are created by the user to help organize the library.

### 6.1 How to create a custom group:

- Position your mouse over the groups bar on the left, **right click** your mouse to create a custom group.  
OR  
From the **References** menu choose the **Groups** submenu then select **Create group**
- Give the group a name
- Highlight the references you want to place in that group and drag & drop over the group name. These references will now appear in that category
- [The option to hide groups is under the tools menu]





## 7. Search library catalogues through EndNote

Library catalogues and some databases are searchable from within EndNote. To search these databases/catalogues you need the right **Connection File**. Some connection files are provided with EndNote and others, including the connection file for the University of Tasmania Library catalogue, can be obtained from the Library's EndNote page:

<http://www.utas.edu.au/library/assist/apps/endnote/>

The EndNote search interface offers a restricted search function compared to the database/catalogue's own search interface. The connect function is most useful for transferring specific references into your EndNote library.

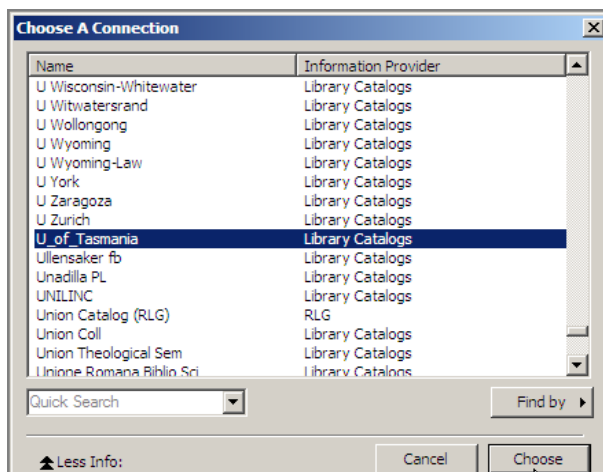
### 7.1 Example: Search the University of Tasmania Library catalogue

- Open your EndNote library
- From **Tools** menu, (or directly from the icon) select **Online Search..**



- If you have not previously connected to the University of Tasmania's Library Catalogue click on **New Search ...** in the submenu

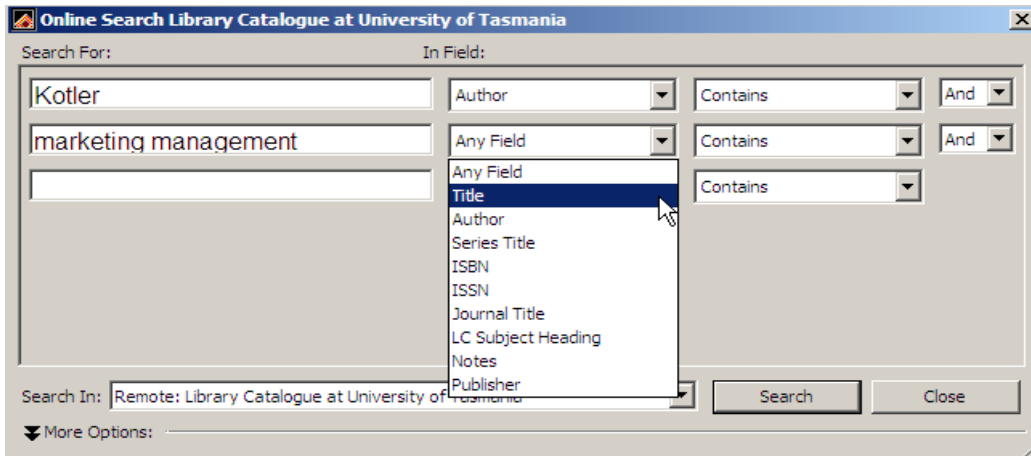
**Choose A Connection File** for an appropriate catalogue



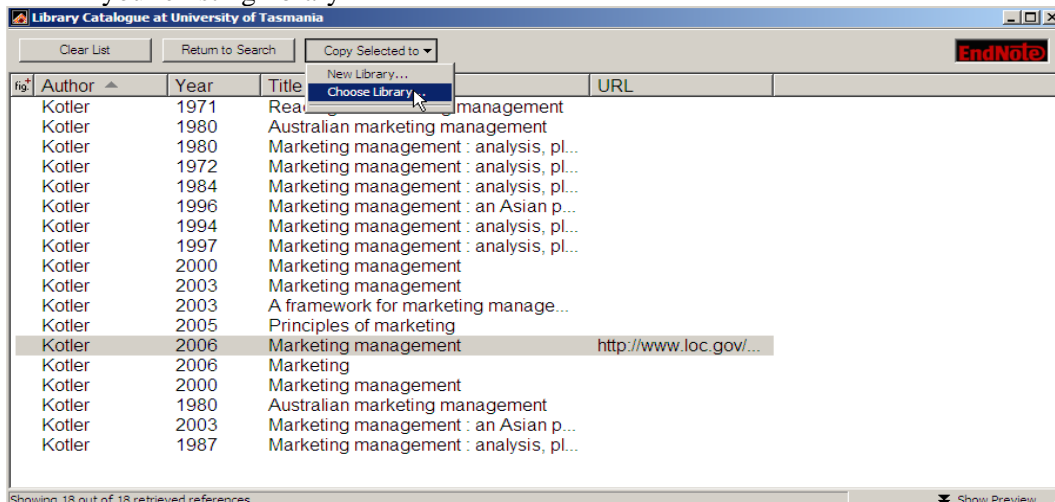
- Select the **U of Tasmania** connection file
- Click on the **Connect** button.

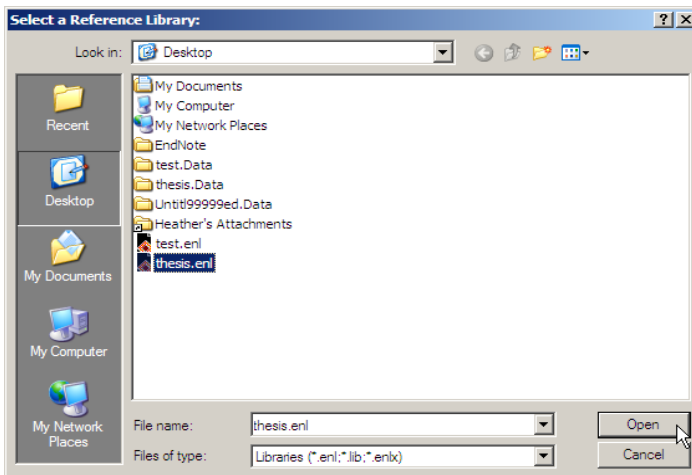
The **Online Search Library Catalogue at the University of Tasmania Library** window appears

- Run a search, being careful to select the appropriate searchable fields
- Click on the **Search** button



- The search result will be loaded and viewable in a temporary window. **Highlight the references** to copy into the Library
- From the temporary window in EndNote ...Click on **Copy Selected To....** then choose your existing library





- Select the EndNote library to which you want the catalogue references loaded **and click open**

Your entire EndNote library will now be displayed, with the new references highlighted.

---

## 8. Citing References and formatting bibliographies using Microsoft Word

In EndNote, referencing or bibliographic styles are called “Output Styles”. You need to select the Output Style that you want to use to cite references from your EndNote Library and to format reference lists or bibliographies. Many Output Styles come with the EndNote software. The Library has modified or corrected some popular styles, which are available from the Library’s EndNote page: <http://www.utas.edu.au/library/assist/apps/endnote/>

### 8.1 Selecting an output style

- From the **Edit** menu, select **Output Styles** and then **Open Style Manager**
- The **EndNote Styles** window appears, listing a range of output styles

- Tick the box of the required style or styles
- Close the window

The main tool bar contains a drop-down menu that displays the Output Styles that you have selected from the **Style Manager**. (If the tool bar is not visible, the **Show Toolbar** options are listed in the **Tools** menu).

You can also access the list of all available styles from this drop-down menu on the toolbar . . .

- click on **Select Another Style...**
- Locate and select the required style
- Click on **Choose**

### 8.2 Displaying the EndNote toolbar in Word

You can display the EndNote toolbar for easier access to EndNote functions

- From the **View** menu, select **Toolbars**, then select **EndNote XI**

An EndNote tool bar will appear that you can allow to ‘float’ or embed in the Word toolbar. These instructions refer mainly to the functions in the EndNote sub-menu available from the **Tools** menu.



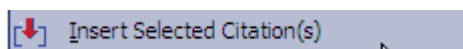
### 8.3 How to insert citations in a Word document

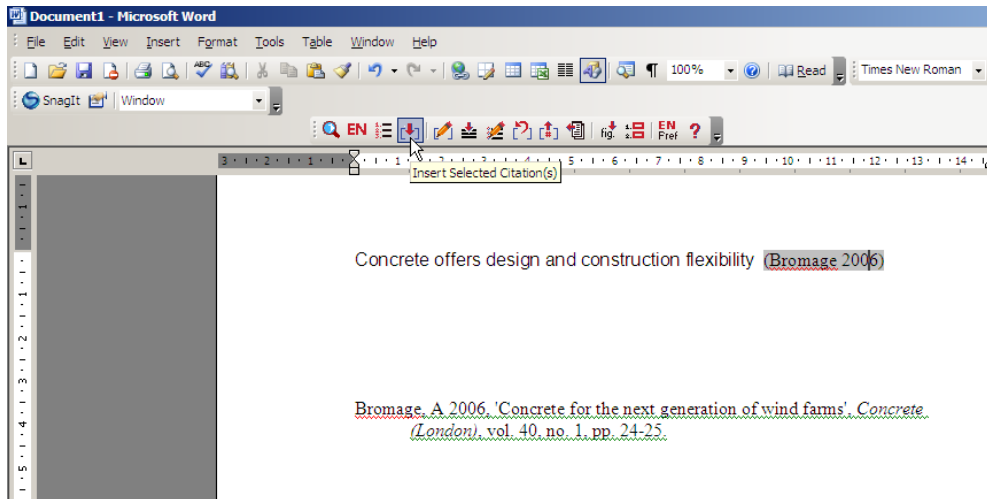
When you are writing a paper with Word or other word processing software, you can cite references from your EndNote library in the body of the text in the document. You need to have your EndNote library open and your word document open.

#### To insert citations

- From your EndNote library, **highlight the reference** or references that you want to cite (use CTRL-Click to select many references)
- In Word, position the cursor in the text of the document where you intend to insert the citation

Use the Endnote toolbar to **insert the citation** (alternatively use the **Tools** menu in Word)

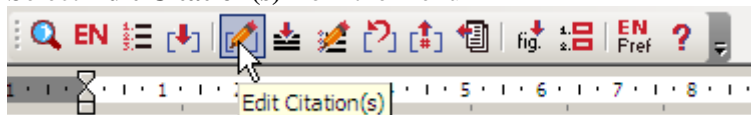




## 8.4 Altering an in-text citation using Edit citation

The citation can be altered to remove the author's name from inside the brackets.

- Click on the citation that you want to change
- Right-click your mouse
- Select **Edit Citation(s)** from the menu



- Click on the checkbox to **Exclude Authors** and then click **OK**.

## 8.5 Turn off Cite While You Write

The Cite While You Write (CWYW) function enables the citation and bibliography to automatically format whenever a citation is inserted.

You **may** wish to turn this automatic function off so that you can more easily perform some editing functions (e.g. adding page numbers, or excluding authors from the in-text reference). This is sometimes simpler than using EndNote's toolbar to perform the same procedure.

How to turn off CWYW

- From the **Tools** menu, select **EndNote XI**
- From the sub-menu, select **Format Bibliography...**
- Click on **Instant formatting** tab
- Click on **Turn Off** button, then click on the **OK**

When you turn off the CWYW, the citations will appear as temporary 'pointers' to the reference in the EndNote library, eg {Ambrose, 2003 #4}. The citations will remain this way and the bibliography won't appear until you format the bibliography.



## 8.8 Creating an "independent" bibliography using drag-and-drop

This procedure enables you to create bibliographies independent of an associated paper.

From the EndNote library

- Use Ctrl-Click to select the items that you want for a bibliography
- Select the required style ("Annotated" style includes abstracts)
- Open the Word document
- Reduce EndNote window so that you can see the Word document behind
- Holding down the mouse button and Ctrl key simultaneously, drag-and-drop the selected references into the Word document.

(The EndNote manual outlines other procedures that may be useful for different purposes)

## 9. Help and problem solving

### 9.1 Local help

Support	The Library is unable to offer support with installation of EndNote software on personal computers and offers only limited technical support. Servicedesk@utas.edu.au, phone 6226 1818
Download EndNote	Staff and students of the University of Tasmania can download EndNote from: <a href="http://www.utas.edu.au/downloads/desktop_software/Endnote">http://www.utas.edu.au/downloads/desktop_software/Endnote</a> POP account and e-mail password required for authentication. Mac and Windows versions available.

### 9.2 Other sources of help and information

EndNote technical support webpage: <a href="http://www.endnote.com/support/ensupport.asp">http://www.endnote.com/support/ensupport.asp</a>
Subscribe to the technical support list: <a href="http://www.isiresearchsoft.com/en/support/en-interest.asp">http://www.isiresearchsoft.com/en/support/en-interest.asp</a>
Email EndNote technical support: pc-endnote@isiresearch.com OR mac-endnote@isiresearchsoft.com
Australian distributor of EndNote: <a href="http://www.crandon.com.au/">http://www.crandon.com.au/</a>
Use the help button on your EndNote program task bar, or access the <b>full EndNote XI pdf manual</b> in your computer's Endnote XI folder. Usually located at : C:\Program Files\EndNote X1\Endnote.pdf