

EndNote

EndNote is a database for storing and retrieving bibliographic references. You can use EndNote to save references, insert citations into word-processed documents and automatically compile lists of references in a range of formats.

Getting Started

Log on to the University network and click on the **Start** button on the bottom left of the screen.

Click on **[All Programs], Networked Applications**, then **General Software** then **Spreadsheets & Databases**.

Click on **EndNote X4**

EndNote X4 and previous versions of EndNote

Documents and libraries created in EndNote versions 8, 9, X, X1, X2 and X3 do not have to be converted for use with EndNote X4.

Libraries created in EndNote 7 (or earlier versions) will be converted into EndNote X4 format when they are first opened. Documents formatted with EndNote 7 (or earlier versions) should preferably be unformatted before use with EndNote X4. Libraries created in EndNote X4 cannot be used with EndNote 7 or earlier versions.

Creating an EndNote library

Each collection of references that you create in EndNote is called a **library** and will have the file ending **.enl**. There are various ways to add references to an EndNote library:

- Manually type or cut and paste the reference information into a Reference Window.
- Export references from databases into EndNote.

- Connect to a database, via EndNote, and import the references into EndNote.

To create a new library in EndNote click on **File** followed by **New....** Give your library a name and save it to your network space on the h:\ drive. You may wish to create an EndNote folder on your h:\ drive in which to save your EndNote libraries.

Entering references manually into an EndNote library

With an EndNote library open click on **References** then **New Reference**. An empty reference window opens. Click on the arrow to the right of the **Reference Type** box and select the type of reference you wish to add then enter data as required. To move between fields, click on the field or use the tab key. Fill in as many fields as you require. Try to input data as consistently as possible - this will make subsequent retrieval easier and more accurate.

To close and save a new reference click on the **x** in the upper corner of the record. The reference is automatically saved and now appears in your library. You may now continue to add references.

Data that appears in red

Data in certain fields such as Authors, Journals and Keywords, may appear in red. This means the database does not recognise the entry as having been used in the library before. If you type in a journal, author or keyword you have previously used in the library, it will attempt to guess the word as you

type, thus saving you time and aiding consistency between records.

Entering data in the Author (and Editor) fields

Place your cursor in the Author field and fill in the author details. Author names can be added in two ways: either "First Middle Last", for example Carol May Jacobson or "Last, First Middle", for example. Jacobson, Carol May: note the comma. Enter one Author name per line, pressing **Return** to add other Authors.

Using the Keywords field

It may be useful to use the 'Keywords' field to give your record some keywords, in order to help organise and group records when retrieving them for output.

For example, for an article from a UK publication on marketing using the internet you may choose to use keywords such as: **UK; Internet; Marketing**. To view previously used terms, click on **Tools** followed by **Open Term Lists**, then **Keywords Term List**. The 'Notes' field may also be used to help identify records, for example, by putting in the date of entry.

Searching an EndNote library

To search for a reference or references in an EndNote library either use the 'Quick Search' box found above the summary view of a library or click on **the Search tab in the bottom pane**. To return to the full set of references, click on **All References** in the left pane of the screen.

Editing a reference

To edit a reference within an EndNote library either double click on the reference from a library's summary view, edit as required then click on the **x** in the upper corner of the record. Or, click on the reference from a library's summary view, then click on **the Quick Edit tab** near the bottom of the screen (if you cannot see the 'Quick Edit' tab first, click on the **Show Tab Pane** in the bottom left corner of the screen), edit the reference as

required then click on another reference in the library to save the changes.

Creating groups within a library

To organise references within a library, for example, by topic, select the references from the summary view of a library, then right click on one of the references and select **Add References To** followed by **Create Custom Group...** Give your new group a name then press **Return**. References can be added to this group by dragging and dropping.

Smart Groups

With smart groups EndNote will organise the references for you. To create a smart group from within EndNote carry out a search of a library then click on **Options** followed by **Convert to Smart Group**. Give the smart group a name then press **Return**. EndNote will automatically add any new references to a smart group if they correspond to the original search criteria.

Exporting references from a database into an EndNote library

There are various ways in which references can be exported from databases into EndNote libraries. These are outlined below. If you are not sure what method should be used to export references from a database into an EndNote library please consult the relevant database guide and/or contact your library.

Please note that some databases are not compatible with EndNote. Therefore, references from these databases will have to be entered manually into EndNote (see above).

Exporting references directly into a library

Many online databases will allow you to export directly into EndNote. After searching the database and marking the references you wish to export, look for an export option for EndNote (You may then be requested to choose an Import Filter from a list). The export

functionality will export the chosen references directly into the open EndNote library.

Exporting references into a library via a text file using an import filter

Some databases, for example, Cambridge Scientific Abstracts (CSA), PubMed and ZETOC require you to save references to a text file and then import the references from the text file into EndNote using an import filter. Once you have saved the text file of references go to EndNote and with your chosen library open, click on **File** followed by **Import** then **File....** Click on **Choose File** and find the file you wish to import and click on **Open**. Select the appropriate import filter from the 'Import Option' drop-down menu (if you are unsure of what import filter to use when exporting references from a database please consult the relevant database guide and/or contact your school library) then click on **Import**. The references will appear in your library.

Connecting to online databases via EndNote

You will see a list of your favourite search databases under 'Online Search' in the left pane. Selecting any of these will establish a connection with that database.

To perform a search for databases not listed among your favourites under 'Online Search' in the left pane select **more...**, this will bring up a list of all the databases that can be searched from within EndNote. Select the relevant database from the list then click on **Choose**.

The Search screen will appear with the name of the database to be searched displayed. fill in the search fields as required and click on **Search**. EndNote will report the number of references found in the 'Confirm Online Search' window. Click on **OK** to import the found references into your library.

Inserting citations and references into a Microsoft Word document

To insert citations and references into a Word document using the EndNote's Cite While You Write (CWYW) functionality it is recommended that you should use the EndNote X4 tab in Word.

To use the CWYW functionality open up the Word document into which you would like to insert citations. Place your cursor at the point where you wish to insert a citation from your EndNote library. Click on the **Go to EndNote** button on the EndNote X4 tab. In EndNote select the reference you wish to insert, then click on the **Insert Citation** button. Follow this procedure for all citations you wish to add.

If you prefer, you can search for a citation from an open EndNote library while in Word. To do this, click on the **Insert Citation** button on the EndNote X4 tab. Enter a keyword or keywords and click on **Find**. Select the reference you require from the search results then click on **Insert**.

You will notice that as well as inserting a citation EndNote automatically generates a bibliography of references at the end of the document.

Changing the output style in Word

To change the output style of an EndNote edited Word document, click on the drop down arrow to the right of the 'Style:' box and select an output style. If the required output style is not displayed in the list click on **Select Another Style...** to view additional output styles, scroll down to the list, select the output style and click on **OK**.

Editing an Output Style

If you want to edit an output style, you may do this by copying the style on to your h:\ drive and then editing it.

To create a copy of the style you wish to edit:

- Go to **Edit** on the toolbar.

- Go to **Preferences...**
- Select **Folder Locations** from the EndNote Preferences box.
- Under 'Style Folder', click on **Select Folder**.
- Click on the output style to select the output style you wish to edit.
- Copy the style (Ctrl + C)
- Navigate to your H: drive using the drop down 'Look in' menu and paste the style into your folder (Ctrl + V).
- Click on **Select**, then **Apply** and then **OK**.

EndNote will now be pointing to your h:\ drive for Styles. To edit the copied style:

- Click on **Edit** then **Output Styles**
- Find the output style in the list then click in the box next to the left of the output style then click on **Edit**. You will now be able to edit the style.
- Click on **File** and **Save** to save your changes.

You will now be able to view the amendments by opening a Word document and seeing the changes when the edited output style is selected.

Transferring references

You can transfer references between EndNote and EndNote Web or vice versa (please refer to the separate EndNote Web guide for information on signing up for an EndNote Web account).

In EndNote with your required library open, go to the left pane of the screen and click on **transfer** found under 'EndNote Web' (if you see 'configure' instead of 'transfer' click on **configure** and enter your EndNote Web email address and password into the 'EndNote Preferences' box) Endnote will now connect to your EndNote Web account and a 'EndNote Web Transfer References' dialog box will open.

Transferring references from EndNote to EndNote web

From the 'Web' drop-down menu select the EndNote Web Group to which you would like the references to be transferred. Select **Transfer References from Desktop to Web**, choose the references, Library or Group which you would like transferred then click on **Transfer**.

Transferring references from EndNote Web to EndNote

From the 'Web' drop-down menu select the EndNote Web group from which you would like to transfer references. Select **Transfer References from Web to Desktop** then click on **Transfer**. After the transfer has completed only the imported references will appear. Click on **All References** to view all the references in the library.

Exiting the database

Close your library and click on **File** then **Exit**.

Further information

Cardiff University EndNote tutorial and FAQs; <http://www.cardiff.ac.uk/insrv/educationandtraining/guides/endnote/index.html> EndNote's own website includes information and support including tip sheets and FAQs: <http://www.endnote.com>

For further information or assistance, contact your Library or INSRVConnect

Tel: 029 2087 4487

Email: insrvConnect@cardiff.ac.uk

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Also available in alternative formats on request.