

EndNote X2: User guide

This guides covers:

- Creating and managing EndNote libraries and references;
- Citing references and creating bibliographies in Word;
- Importing records into EndNote.

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1. GETTING STARTED WITH ENDNOTE

1.1 What is EndNote?

- Creates in-text citations in Word documents;
- Creates formatted bibliographies;
- Imports references from library journal article databases and catalogues;
- Sorts and stores references.

1.2 Opening EndNote

1. Click on *Start > Programs > EndNote > EndNote Program*.
- 2 Select *Open an existing EndNote library*.
3. Click on *Browse*.
4. Select the library you want and click on *Open*.

1.3 Creating your own EndNote library

1. Open *EndNote*.
2. Select *File > New*.
3. Name and save the library (EndNote will add the file extension *.enl* automatically).

1.4 Saving your EndNote library

- To make a copy of your **EndNote library only** (does not include styles, filters and connection files):
 1. Open your EndNote library.
 2. Select *File > Save a copy*.
 3. Name the library and choose where to save it.
 4. Click on *Save*.

<p>◆ Backing up additional files - Use your file management software to back up your EndNote library, and any modified styles, filters and connection files. The default location for these files is C:/ Program files/ Endnote.</p>
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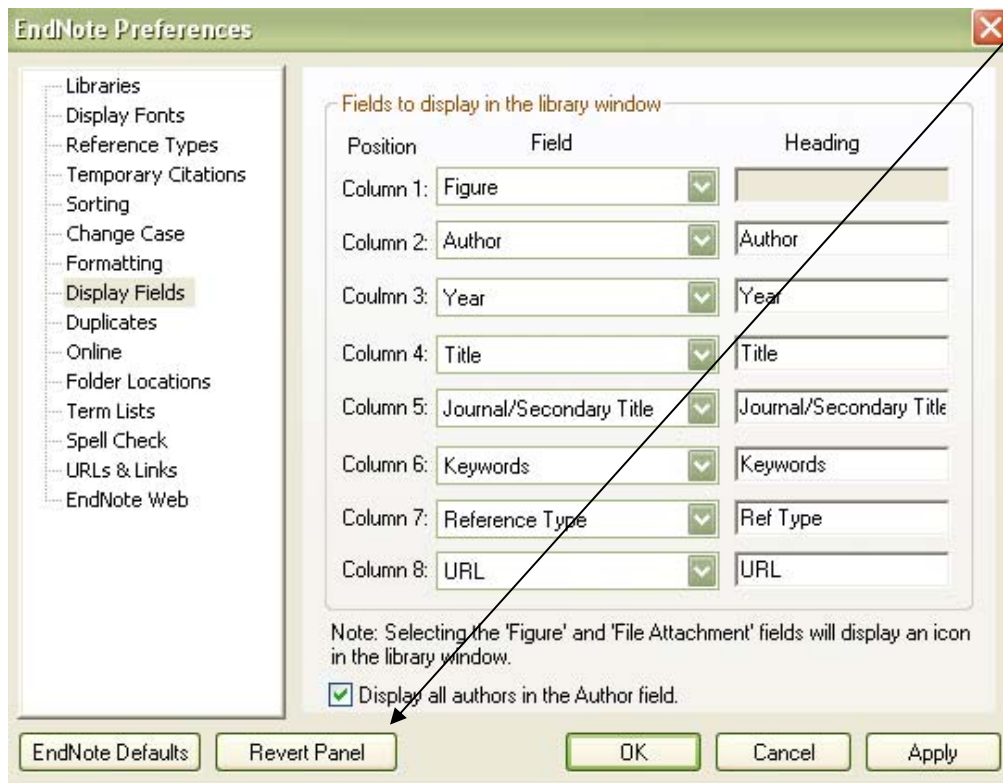
1.5 Opening an EndNote library automatically

You can specify library/ies to open automatically when EndNote starts up.

1. Open the library/ies you would like to open automatically.
2. Go to *Edit > Preferences > Libraries*.
3. Select an option from the *When EndNote starts* drop down menu, e.g. *Open the specified libraries*.
4. Click on *Add open libraries*.
5. Click on *Apply > OK*.

1.6 Customizing the EndNote library display

1. To change the fields displayed, go to *Edit* > *Preferences* > *Display Fields*.
2. Choose the fields you want to display from the drop down menu. For example, tick the *Display all authors in the Author field* box if you would like all authors displayed.



3. Click *Apply* > *OK*.

These settings will now apply to all of your EndNote libraries.

2. IMPORTING RECORDS INTO ENDNOTE

2.1 Direct exporting OVID database records

Ovid databases include:

AMED	Inspec
Biological Abstracts	International Pharmaceutical Abstracts
CAB Abstracts	MEDLINE
Current Contents	The Philosopher's Index
EMBASE	PsycINFO

1. Search an OVID database at <http://www.lib.latrobe.edu.au/>
2. In the *Results Manager* section:
 - Select *Selected Results* under the *Results* heading;
 - Select *Complete Reference*;
 - Select *Direct Export* under the *Result Format* heading;
 - Click on *Save* under the *Actions* heading;

The screenshot shows the 'Results Manager' window with the following sections:

- Results:** Radio buttons for 'Selected Results' (selected), 'All on this page', and 'All in this set (1-422)'. Below is an 'and/or Range:' input field and a 'Clear Selected Results' button.
- Fields:** Radio buttons for 'Citation (Title,Author,Source)', 'Citation + Abstract', 'Citation + Abstract + Subject Headings', and 'Complete Reference' (selected). A 'Select Fields' button is below.
- Result Format:** Radio buttons for 'Ovid', 'BR5/Tagged', 'Comma Separated', 'Reprint/Medlars', 'Brief (Titles) Display', and 'Direct Export' (selected). A checkbox for 'Include Search History' is at the bottom.
- Actions:** Buttons for 'Display', 'Print Preview', 'Email', and 'Save'.

3. When EndNote opens, select the reference library into which you want to import the records. Click *Open*.

2.2 Importing from other Library databases

For information on how to download from other library go to <http://www.lib.latrobe.edu.au/help/endnote/filters.php>

2.3 Importing from Google Scholar

1. Go to the Scholar preferences page http://scholar.google.com.au/scholar_preferences
2. Towards the bottom of this screen you will see a section called Bibliography Manager. Under this select the 'Show links to import citations' and select Endnote from the dropdown menu.
3. Perform a search and you will see that a new link appears under each citation - "Import into EndNote". Click on this to import individual references into your Endnote libraries.

2.4 Importing La Trobe University Library Catalogue records

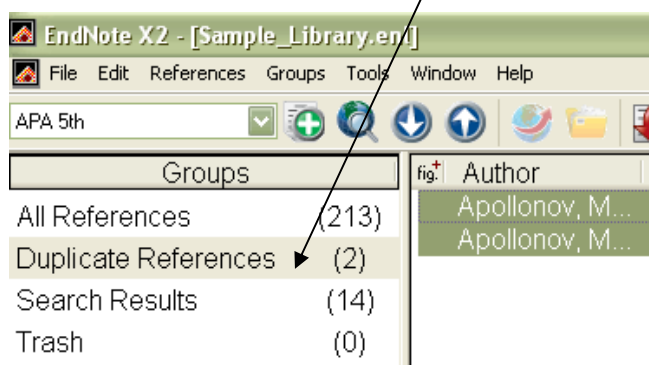
Use a connection file to import La Trobe University library catalogue records.

1. Open EndNote.
2. Select *Tools > Online search*
3. Select the connection file *La Trobe U* and click on *Choose*.
4. Search the catalogue by typing in your search terms, and click on *Search*.

There is also an import filter for import La Trobe University Library catalogue records at <http://www.lib.latrobe.edu.au/help/endnote/filters.php>

2.5 Searching for duplicates

1. Click on the Group *All References*.
2. Click on *References > Find duplicates*.
3. Click on the Group *Duplicate References*.
4. Choose *Move References to Trash* from the *References* menu (or *Cut* from the *Edit* menu) to remove the duplicates from your library.



◆ Customizing EndNote duplicates searching

The EndNote default criteria for detecting duplicates are reference type, author, year and title fields. You can change the criteria for detecting duplicates by selecting:

1. *Edit > Preferences > Duplicates*.
2. Select the fields you want EndNote to compare e.g. Author, Year and Pages.

3. CITING REFERENCES AND CREATING BIBLIOGRAPHIES IN MICROSOFT WORD

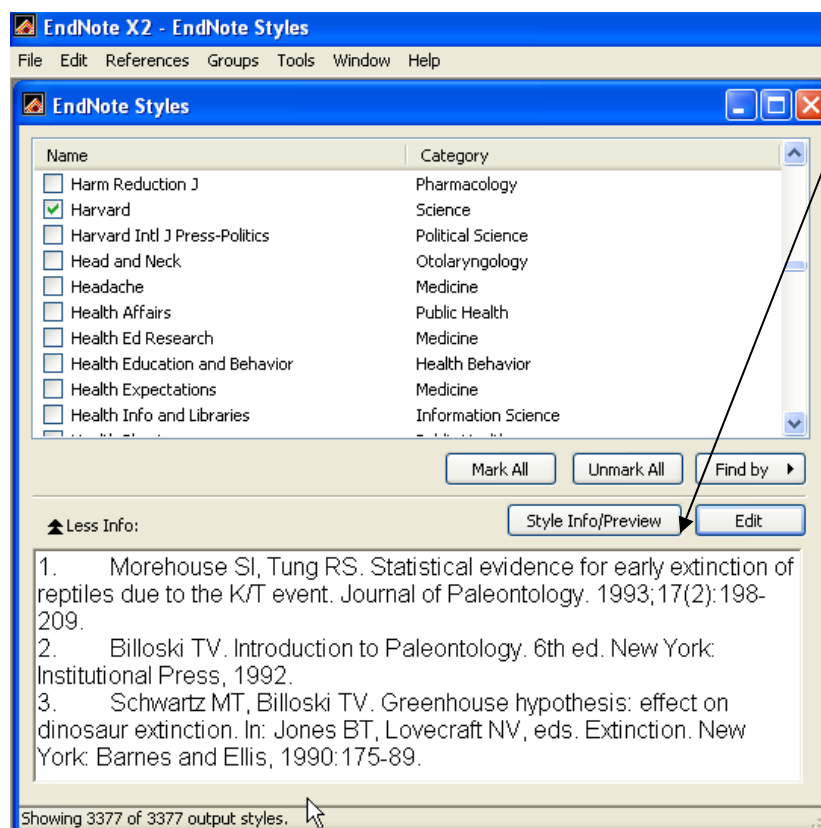
3.1 Inserting citations into your Word document

1. Open the EndNote library/ies that contain the references you want to cite.
2. Open your Word document and position the cursor in the Word document where you want to insert the citation.
4. **Alt 1** (this takes you to EndNote).
5. Select the citation/s you want to insert. Select multiple references by holding down *Ctrl* while *clicking* on the required references in your EndNote library (OR *Shift* and *click* to select a continuous range of references).
6. **Alt 2** (this inserts the citation/s in your Word document).

3.2 Selecting a bibliographic style

The bibliographic style determines how EndNote formats the citations and bibliography.

1. Go to the EndNote *Edit> Output styles* menu.
2. If the style you want is not listed in the default list, select *Open Style Manager*.
3. Preview styles on the EndNote styles screen by selecting *Style Preview*.
4. Use *Find by* to view styles by subject area OR type in the first few letters of a style name e.g. *APA* to preview a style.
5. Select your style/s by ticking the box to the left of the styles.



3.3 Formatting your bibliography

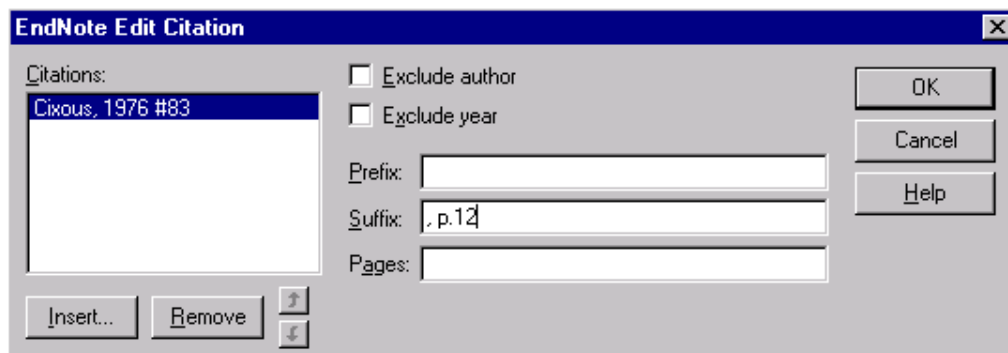
1. To format your citations and bibliography, click on **Alt 3**.
2. Verify the selected bibliographic style or select another bibliographic style from the *With output style* drop down menu.
3. Click on **OK**.

For information on using styles to abbreviate journal titles e.g. *Biochem Cell Biol*, go to <http://www.lib.latrobe.edu.au/help/endnote/EndNote-Abbrev-journal-titles.pdf>

3.4 Editing or removing in-text citations

You may want to remove the year, author or citation, or add a page reference to citations.

1. Click on the formatted citation.
2. Right mouse click on the citation and select Edit Citation/s > More
3. Edit the citation as needed. Some of the *Edit Citation* options include excluding the author or year or adding page numbers. Page numbers should be entered in the **suffix field**, e.g. , p.12





3.5 Creating an independent EndNote bibliography

1. Open the library from which you would like to print references.
2. To print **all references**, make sure all references are showing **OR**
To **select references** for exporting, use the *Search* command on the *References* menu OR you can use *Ctrl* and *click* or *Shift* and *click* to select references. If you use *Ctrl* and *Shift* or *Click*, you will then need to go to the *References* menu, and click on *Show Selected References* so that only the selected references are displayed.
3. Choose a style from the *Output Styles* submenu on the EndNote *Edit* menu.
4. Choose *Export* from the EndNote *File* menu.
5. Name the file, specify the save location and select the file type *rtf*.
6. Click on *Save*.
7. Open and print the bibliography in Word.

4. ENDNOTE REFERENCE MANAGEMENT

4.1 Typing references into your EndNote library

1. Click on *References*>*New Reference* or the New Reference icon 
2. Select a Reference type from the *Reference Type* drop down menu. The default Reference type is *Journal Article*.
3. Enter bibliographic data.
4. Use the *Tab* or *Shift Tab* key's to move up and down through fields in a reference.
5. Click on Close  to save and close the reference (Shortcut: *Ctrl W*).

Authors

- One author name per line.
- Organizations must be entered with a comma at the end. If an organization name has one or more internal commas, replace the first of those commas with two commas, and don't put a comma at the end (see example below).
- If you don't know all author names, the last author should be **et al.**, **OR** and **others**, (include the comma following *et al* or *and others*).

Smith, Bill

Smith, B. K. (space between initials)

Smith, Bill, Dr (the second comma denotes a title)

Smith, Bill, Jr.

La Trobe University,

Department of Agriculture,, Division of Animal Health

Titles

- Don't use any formatting, with the exception of italics for a species name etc. Do not use full stops at the end of article or book titles.
- EndNote Output styles can change the capitalization of titles, but it's best to capitalize the title in the same way that you would like it capitalized in your bibliographies.

Pages

- Page numbers can be entered as complete (1332-1339) or abbreviated (1332-9).
- EndNote can change the page number to full or abbreviated page numbers, or just the first page, depending on the output style selected.
- Don't use commas within numbers e.g. 1,329

Keywords

- Keywords can be separated by semi-colons ; or backslashes \

Links to PDF files

Links can be created to pdf and other files from EndNote references. EndNote can link to files in their original locations on your computer, or to copies saved with your library for easy portability.

1. Select or open a reference.
2. Choose *References > File Attachments > Attach File*
3. Locate and select the file you want to link to.

URLs

- Enter multiple URLs, one per line.

ANSI Codes

- Enter special characters such as diacritical characters, Greek symbols, e.g. ä æ è) by copying and pasting from Word OR using ANSI codes.
- To use ANSI codes, hold down the *Alt* key and type the ANSI code on the numeric keypad.

0131	f	0162	¢	0193	Á	0224	à
0132	„	0163	£	0194	Â	0225	á
0133	…	0164	¤	0195	Ã	0226	â
0134	†	0165	¥	0196	Ä	0227	ã
0135	‡	0166	¦	0197	Å	0228	ä
0136	^	0167	§	0198	Æ	0229	å
0137	‰	0168	¨	0199	Ç	0230	æ
0138	Š	0169	©	0200	È	0231	ç
0139	‹	0170	ª	0201	É	0232	è
0140	Œ	0171	«	0202	Ê	0233	é
0141		0172	¬	0203	Ë	0234	ê
0142	Ž	0173		0204	Ì	0235	ë
0143		0174	®	0205	Í	0236	ì
0144		0175	¯	0206	Î	0237	í
0145	‘	0176	°	0207	Ï	0238	î
0146	’	0177	±	0208	Ð	0239	ï
0147	“	0178	²	0209	Ñ	0240	ð
0148	”	0179	³	0210	Ò	0241	ñ
0149	•	0180	´	0211	Ó	0242	ò
0150	–	0181	µ	0212	Ô	0243	ó
0151	—	0182	¶	0213	Õ	0244	ô
0152	~	0183	·	0214	Ö	0245	õ
0153	™	0184	¸	0215	×	0246	ö
0154	š	0185	¹	0216	Ø	0247	÷
0155	›	0186	º	0217	Ù	0248	ø
0156	œ	0187	»	0218	Ú	0249	ù
0157		0188	¼	0219	Û	0250	ú
0158	ž	0189	½	0220	Ü	0251	û
0159	ÿ	0190	¾	0221	Ý	0252	ü
0160		0191	¿	0222	Þ	0253	ý
0161	ı	0192	À	0223	ß	0254	þ
						0255	ÿ

4.2 Editing and deleting EndNote references

- **Copy and paste** references = *Ctrl C* and *Ctrl V*. The new reference will be highlighted. Always edit the new reference.
- *File/ Revert reference* discards all changes made to a currently open reference since it was last opened or saved.
- **Delete references** = *References/ Move References to Trash* (Shortcut: *Ctrl D*).

4.3 Navigating your EndNote library

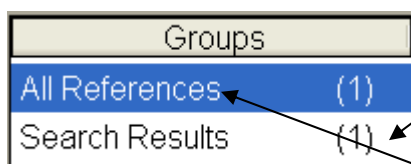
- Click on the vertical scroll bar with the mouse.
- Use the \uparrow \downarrow keys to move up or down from the currently selected reference.
- *Home* (first reference) and *End* (last reference) and *Page Up* and *Page Down*.
- Type in the first few letters of an author's surname.
- Sort your library by clicking on a column heading, e.g. the title, year or author column headings.

◆ Library sort order

1. Change the sort order in your EndNote library by selecting *References > Sort References*.
2. Select one or more fields to sort.
3. Click on the *Ascending/ Descending* order button/s.
4. Click on *Sort*.

4.4 Searching for references in your EndNote library

1. Click on *Tools > Search Library*.
2. Enter search terms.
3. View your search results in the Groups column.



◆ Search hints

- *Esc* cancels a search in progress.
- When you have finished working with your search results, click on *All References* in the Groups column to view your complete library.

5. ASSISTANCE WITH ENDNOTE

- The La Trobe University Library EndNote page includes information on importing records, software downloads, FAQs, software compatibility issues etc.
<http://www.lib.latrobe.edu.au/help/endnote-help.php>
- EndNote web page <http://www.endnote.com/>

[w:/Endnote X2_UserGuide.doc_Sept09.doc]