



Introduction to EndNote XI

Session Aims:

- ◆ Introduce basic EndNote functions
- ◆ Create an EndNote Library
- ◆ Add references manually, by direct export and by using Online searches
- ◆ Linking to files
- ◆ Using EndNote when working with word for in-text citations or footnotes, and creating bibliographies

What is EndNote

EndNote is software for making referencing and management of your references easier. It allows you to save citations in your own personal reference list, and avoid endless retyping of citations when writing up your research.

EndNote can be obtained from:

- ◆ <http://itassist.usyd.edu.au/staff/services/software/endnote.shtml> (For Staff)
- ◆ <http://itassist.usyd.edu.au/student/services/software/endnote.shtml> (For Students)

Creating an EndNote Library

A library is the Endnote term for the file you create to hold your set of references.

- ◆ Choose **New** from the **File** menu or click on the **New Library** icon on the **EndNote** toolbar
- ◆ The dialogue box will open with **Untitled.enl** as the name of the new library.
- ◆ Choose a location for your new **EndNote** library.
- ◆ In the **File name** box, type a name for your library.
- ◆ Click on the **Save** button.

Manually Entering References

- ◆ In EndNote, click on **References**, select **New Reference** or click on **New Reference** icon
- ◆ Choose **Reference Type** eg, (book, journal article, edited book, etc)
- ◆ Add information into relevant fields.
- ◆ Save reference to the library by closing the reference window (click on the lower **X** in the top right corner).

For more detail about entering references, and reference types, see the Web Tutorial.

Working with Groups

- ◆ Custom groups can be created to help organise the library, eg into chapters.
- ◆ To create a group, click on **References**, select **Groups**, then **Create New Group** OR
- ◆ Select references in the list, then click on **References**, then **Add References to**, then **Create New Group**



Importing References Directly From a Database

Direct Import from Web of Science

- ◆ Open Web of Science and perform a Topic search.
- ◆ Select references to save by checking the box next to each citation.
- ◆ Click on **Add to Marked List** button at top of references.
- ◆ Click on the **Marked List** button at page top.

When the Marked Records screen appears, select any additional fields you would like to export by checking the box of each required item.

- ◆ Click the **Save to Endnote, RefMan or other reference software** button.
- ◆ Endnote will automatically open.
- ◆ The “Select a Reference Library” dialogue box will appear.
- ◆ Find the required library and click **Open**.

The references will be imported into your EndNote Library in an automatically generated group called **Imported References**. After closing your library these records will be incorporated into **All References**.

Direct Export from Proquest 5000

- ◆ Do your search and select references by clicking the checkbox beside each one, or click **Mark all** on page
- ◆ Click **Export**
- ◆ On the Export citations page, click **Export directly to ProCite, EndNote or Reference Manager**
- ◆ The “Select a Reference Library” dialogue box will appear.
- ◆ Find the required library and click **Open**. The references will be imported into the **Imported References** group.
- ◆ **NB** You will need to edit each author's name because the author's family name is treated as the given name and vice versa.

Attaching a file (eg PDF) to a Reference

- ◆ Save a PDF to a convenient folder (temp directory)
- ◆ Open the appropriate Endnote reference.
- ◆ Click on the **Reference** menu and choose **File Attachments>attach File**.
- ◆ A dialog box will appear, allowing you to select the file.
- ◆ When closing your reference window, save changes to the record.

Once you have the file in your EndNote reference, you will be able to open it from within EndNote.

NB : Note that the PDF is now linked, so deleting the PDF from the folder will delete access. For instructions on how to export records from other databases, go to the Web Tutorial.



Importing References using Online Searches (Direct Connection)

Using Online Search you can connect to many library catalogues and provide an EndNote search screen which can be used to do basic searches.

To search in the University of Sydney Catalogue:

- ◆ Click on the EndNote **Tools** menu.
- ◆ Select **Online Search**, then **New Search**, then highlight **U Sydney** and click on **choose**.
- ◆ Enter your terms then click on **Search**.
- ◆ Click on **OK**.
- ◆ Once you have completed the search, the results are sent to a “temporary holding Library”

Copying records to your library:

- ◆ Use the dropdown **Copy all to** menu to transfer records to your EndNote Library.
- ◆ Close the temporary holding library. (While this discards the references there, they will still be in your EndNote Library)
- ◆ Close the connection to the catalogue.

NB: EndNote will not usually allow you to perform more than one search at a time in Online Search – it will return with the message “zero hits” if you try.

Working with Word

References can be inserted into a Word document and bibliographies created using EndNote. Enter references either as you go, or after you have finished typing your document.

To enter a reference:

- ◆ Begin with an open Word document, either one you have created, or as you are typing it.
- ◆ Position the cursor where you want to insert the reference - as a footnote, endnote or in text citation.
- ◆ Open EndNote
- ◆ Open the library that contains the reference you wish to cite.
- ◆ Highlight the required reference
- ◆ Return to Word and from the EndNote toolbar select Insert selected Citation(s) or use icon.
- ◆ The reference will display within the document, and is added to the bibliography at the end of a document.

The choice of in-text, footnoting or endnoting depends on the academic requirements of your department. There are many styles available. Discuss these with your Department or Faculty Liaison Librarian.

Formatting Your Bibliography

- ◆ In Word select the Tools menu or from **EndNote toolbar** choose **Format Bibliography** icon.
- ◆ In the dialogue box, select a style from the **with output style** option.
- ◆ If you need to change the style, choose Show all and browse to select another style.
- ◆ Click on **OK** to format.



- ◆ EndNote then scans the paper for citations you inserted and appropriately formats citations and bibliography for the style you selected.

From this dialogue box, you may also add a heading to your bibliography, change font and adjust spacing between references by choosing the **Layout** tab, and working through the options.

Editing Citations

Inserted citations can be edited at any time e.g. add page numbers, remove the year, remove the author. You will need to use a style that supports these variations.

Including page numbers in an in-text citation:

First change your style to one that supports this, eg APA 5th (format your bibliography). Highlight the citation in the document.

- ◆ From the EndNote toolbar select **Edit Citations**.
- ◆ From the Edit citation window, enter page numbers by adding them in the pages field e.g. , 130-135 or 34
- ◆ Click on **OK** to save.

Adding Footnotes

First format your bibliography to a style that supports footnotes, eg Chicago Review style.

- ◆ In Word select the **Insert** menu
- ◆ Select reference and click on **footnote**.
- ◆ Select **bottom of page** or **below text**¹.
- ◆ Click on **Insert**.
- ◆ Use Endnote to insert your reference as with in-text citations.

EndNote is a tool to help you with managing your references and writing up your research. Each database and style guide will have some unique elements so check the *EndNote tutorial*.

Advanced Endnote

To learn about importing references using a filter file, check the EndNote tutorial or contact your Faculty Liaison Librarian.

Your Faculty Liaison Librarian will be able to help you with advanced EndNote elements, such as editing citation styles and downloading filters. Find their contact details at <http://www.library.usyd.edu.au/contacts/subjectcontacts.html> or call Fisher Library Information Desk on 9351 2994.

¹ Insert citation here for footnote styles such as Chicago Review or MLA etc