

EndNote X7: the basics (downloadable desktop version)

EndNote is a package for creating and storing a library of references (citations plus abstracts, notes etc) – it is recommended that you do not exceed 50 000 references – which can be sorted into groups, and the library can then be used in conjunction with the typing of Word documents and creation of bibliographies. Full text documents, figures, tables etc can be added to the references as attachments. Once installed, EndNote X7 will automatically appear on your Microsoft Word ribbon. If it does not, uninstall and reinstall.

EndNote X7 is compatible with Office 2013 and Windows 8.

The license permits downloading onto private pcs. The desktop version means internet access is not required to use EndNote all the time.

Download EndNote at: <https://softwarerep.ukzn.ac.za/>, then choose Academic Software, then EndNote and then EndNotex7.install.exe.

A. 1. There are two ways to access EndNote and create a library:

- Start, All Programs, EndNote and EndNote program.
- Click on the EndNote tab on the Word ribbon then 'Go to EndNote'.



2. The EndNote screen will open up. The *first time* you use EndNote you may get a screen with 3 boxes that asks you to choose to open an existing library, create a new library or you may get a 3-way split screen which is ready for you to work in.

Choose to 'create a library'. You will have to name it – the default library name is MyEndnote library.enl which you can accept/use - and save it before adding references. Its default location is Documents.

If you give the library another name rather than use the default one, make sure you add .enl at the end of the name

You will not see this screen again.

3. The EndNote screen is divided into 3 parts.



- The left hand column: total references you have, those recently added, and groups within the library. NB! Above the column make sure the 3rd icon (globe with books) is activated to see all references
- The middle column: the library of references indicating brief details of references, unformatted

- The right hand column : Reference = the template for a reference; Preview = how a bibliography reference will appear in a chosen style; paperclip = view attachments (attached pdfs) or attach a file of any sort eg pdf, videoclip, word document to a reference

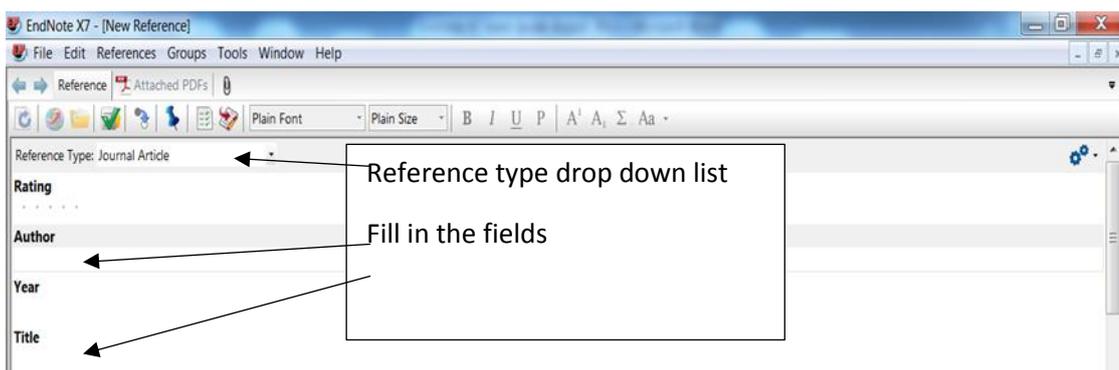
Viewing references in a particular style and shortcut icons

- Above the top left column of your main EndNote screen is a toolbar of short cut icons some of which will be explained later.
- On this toolbar, above the left hand column is a white search box – this is where you set up favourite styles. Choose a style listed in the dropdown list, or click on the option ‘Select another style’ and choose from the very long alphabetical list – of general styles or styles for specific journals. Your library of references in EndNote is not saved in any particular style. Choosing a style at this stage just enables you to see what a bibliography reference will look like. Setting the style is critical at the document typing stage.

B. CREATING A LIBRARY OF REFERENCES

a) Manually adding references by filling in the form

- The Endnote library window is situated on a grey background screen. On this background screen click on ‘References’ on the toolbar and then on ‘New reference’ to open the reference screen. An alternative is to click on the ‘Add new reference’ icon on the toolbar of the Endnote library page: (a white page with a green circle/white + sign).
- Choose the REFERENCE TYPE (above the form) from the drop down menu
- Fill in the necessary details below the filed headings. NB! ALWAYS ADD AUTHORS BY SURNAME FIRST followed by a comma before the initials and EACH AUTHOR MUST BE ENTERED ON A SEPARATE LINE (If your author is a corporate body e.g. Durban City Council put a comma after the last part of the author name e.g. Durban City Council, Without the comma EndNote will interpret this author as Council, D C. If you want a fullstop after the name in your bibliography, put a full stop before the comma).
- To SAVE the reference to the library, click on the ‘x’: top right of the New Reference form as if to close the window. You will then be asked if you want to save the reference, click on ‘Yes’ to save. The reference will now appear in your library: middle column.



Click on the grey x of the reference screen or form to save the reference to the Endnote library

Editing or making corrections to a reference or changing the reference type

- At any stage you can change information relating to a reference or check what information has been downloaded into the reference form in the case of imported references. Double click on the reference from the middle column of the Endnote library to open up the form. Make the necessary changes (additions and deletions) within the fields of information. Save the form.

- If you have chosen the wrong reference type or want to change the reference type eg journal article instead of electronic journal article, open up the reference form, choose the correct reference type from the drop down menu of reference types and click on the correct one. Save the form. Your reference information is automatically changed to suit the new reference type.

b) Adding references by exporting / importing from an online database (or desktop file) including Google Scholar

Many databases work with Endnote and it is possible to 'send' a single or group of references from a database to Endnote.

- From the UKZN library website, choose a database and run a search in a database. Save needed references to a folder / list etc
- Find and click on the 'export' button – usually exporting is an option listed alongside the other options of print, email, save etc. Every database is different. You may have to choose the Endnote option from a list. Be careful NOT to choose Endnote Web. Read the instructions on the screen of the database you are in.
- Anything may happen next – this is the tricky part! Your screen may go partially blank and then the references appear in the library, or, a window may open at the bottom of the screen and you will be asked whether you want to save or open. Click on 'Open'. The references may go directly into your library or you may get a screen of options first, in this case make sure that Endnote is highlighted. Then click ok. If your library 'disappears', it has probably been minimised to the bottom of your monitor.
- The URL will be a permanent fixture of the reference form and is a clickable link.
- **You can also export references from the new icatalogue.** Click on the title of an item from a results list and choose the export function.

Google Scholar. You need to set GS up to be able to export into Endnote and you only need to do this once for a particular machine. From the Google Scholar home page, click on the settings or wheel icon on the top right of the GS page and click on 'Scholar preferences'. At the bottom of the screen in the last option Bibliography Manager choose EndNote and then click on 'Save preferences'. Once you have a Google Scholar reference to add to your library, click on 'import to Endnote' at the end of the reference and then open up the relevant EndNote library.

Beware!!!! Google Scholar fields do not always align correctly with those given in the EndNote template so after importing records, open up the templates and check that the imported information is in the correct fields. If there is a link from GS to a library database, rather export from the database.

Imported references only will be displayed in your library after an import session. **Click on 'All references' at the top of the left hand column to see all the references.**

c) Adding pdfs from your desktop and creating citations for them in EndNote

Click on the GREEN DOWNWARDS POINTING ARROW on the toolbar. Fill in the details in the box that appears. You will have to open up the form for the reference and fill in the details once the pdf has been imported.



C. SAVING / ATTACHING FULL DOCUMENTS AND ASSOCIATED MATERIAL TO THE EXISTING CITATIONS

EndNote does not automatically save the full text documents attached to database citations. This is a two step process where material is added to the citation as an attachment. There are several ways to do this:

A. Manual option 1: Drag and drop

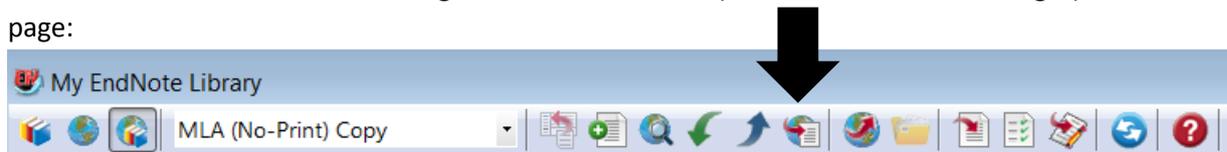
- First save the document accompanying the citation to your desktop (be careful how you label the document as you must be able to recognize it. Databases often just give files numbers!). It is best to save the document under the author surname and year as Endnote defaults to alphabetical author order
- Reduce (not minimise!) the size of your Endnote screens so you can see your documents on the desktop. Highlight the reference in Endnote and then from your desktop drag and drop the attachment. A small box will open up in the centre of your screen asking if you want to save changes. Click yes. You will now see a paperclip symbol to the left of the reference.

Manual option 2: attach via the References option on the toolbar

- Click on 'References', then 'file attachments'; 'attach file'; find the file and then double click on 'Open'.

B. Do a web search from within EndNote

Once you have an online reference/ in your library, highlight it/them and then click on the icon in the middle of the main toolbar that is a globe with a red arrow (downwards from left to right) and a white page:



This icon will search the Web looking for the full text availability (only if it is free or paid for by UKZN). Beware! It is not foolproof. The easiest way to find the pdf is to work from the "imported references" folder. If done here, the pdf is added automatically. Watch the left hand column of your library to see what is happening. It takes a while.

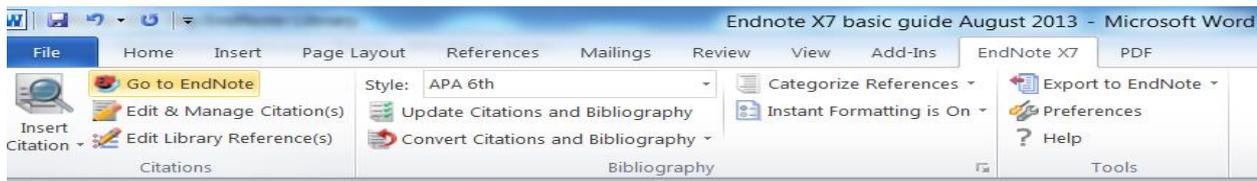
D. CREATE GROUPS OF REFERENCES: groups and smart groups

- On the EndNote toolbar, click on 'Groups' and then 'Create group', type the name of the group (can be a topic, author, journal title, thesis chapter – anything) in the left hand column of the Endnote screen
- To add references to a group, highlight the references and then drag and drop into the group, or, from the toolbar click on 'Groups', then 'Add references to', and choose the group name, or, right click and follow the same steps. Copies of your references will be added to that group, but will still also remain in the overall list of references. You are moving copies of references into the group, the original stays in the main library
- Smart groups are groups that you can attach a search strategy to and as you add references to your library, the smart group will automatically be added to where relevant. Open 'all references' and then go to 'groups' on the tool bar and click on 'create smart group'. A screen opens up at the bottom. Give your smart group a name and then add the details you wish to be identified in references, and where you want these details to be searched for (eg in abstract, anywhere). Then click 'create'.

E. CITE WHILE U WRITE – adding citations to a Word document and simultaneously creating a bibliography

1. Open a Word document or create a Word document and open the EndNote option on the Word ribbon.
2. Choose the referencing style (middle box in the EndNote section of the Word ribbon).

3. At the point in the document where you need to *enter a reference*, click on 'Go to EndNote' from the Word ribbon.



4. The EndNote library then opens up. From the EndNote list of references, highlight the reference you want to cite. Then, from the EndNote toolbar that appears, click on the 'insert citation' icon: or click on 'Tools', then 'Cite while you write' and then 'Insert selected citation'.

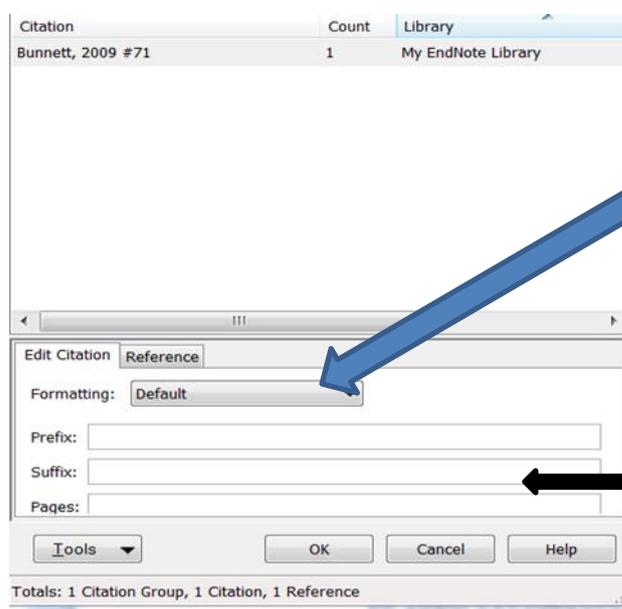


If you want to insert multiple references into a citation, hold down the ctrl key and highlight all the needed references. EndNote tends to defer to arranging multiple references alphabetically.

While you are working on a document, cited references may appear in curved brackets which will disappear once you save the document. A bibliography is automatically created in your document. Format the bibliography and references by clicking on the 'update citations and bibliography' in the Word ribbon.

5. **On the Word toolbar you can also edit a citation.** You usually need to use this function to add page numbers or change the details in an in-text **citation** depending on how you write.

- Highlight the in-text reference by holding your mouse over it and moving across the reference (starts off as grey, needs to be in dark blue), click on 'Edit and manage citations' and the following edit box appears. Choose whatever option you need – see below



Default

- Display as: Author (Year)
- Exclude author
- Exclude year
- Exclude author and year
- Show only in bibliography

Use these 3 boxes to add information at the front or end of an in-text citation and page numbers. If the referencing style does not use page numbers, add them in using the Suffix option (add punctuation and spacing as well eg p. 45)

- To update global changes to references, use the update citations and bibliography option from the Word ribbon.

F. REFERENCING STYLES

Be aware that the version of any particular broad referencing style such as APA, MLA, Harvard etc. on EndNote may differ from what is required by your supervisor / lecturer. A summary of the EndNote version of a style can be accessed as follows: from the EndNote toolbar choose Edit, then output styles, click on 'Open style manager' then find your style and tick in the box next to it. Then click on the 'Style/Preview option' or 'edit' for examples of style layout at different levels of detail. EndNote works largely with styles of prominent journals and excludes most South African journals so you might have to find a close match and do some editing.

Changing aspects of the default style

To change some aspects of the default style do the following: from the toolbar go to Edit, 'Output styles', 'Open style manager', tick the box next to the style you are using and then click Edit. If you make changes you will need to save this new version of the style with a new name. There are templates for in text citations as well as bibliography. Choose options and alter accordingly.

G. CREATE A BIBLIOGRAPHY INDEPENDENT OF A WORD DOCUMENT

- For a bibliography of particular references:** Choose the required style from the EndNote section of the Word ribbon. Highlight required references then from Edit click on 'copy formatted' (or, once references highlighted, right click and choose Copy formatted), open a new Word document and paste references into the Word document
- For a bibliography of the entire EndNote library:** Choose the required style. Highlight any reference and from edit, click on 'Select all.' Then from Edit click on 'copy formatted' (or, once references highlighted, right click and choose Copy formatted), open a new Word document and paste references into the Word document

EXTRAS

To save a Word version of your bibliography that is not affected by EndNote formatting in order to make manual changes, go to the 2nd box on the Word ribbon under the EndNote tab, click on the arrow next to 'Convert citations and bibliography' and choose 'Convert to plain text'.

Saving a copy of your library

Although it is very difficult to delete an EndNote library, libraries can be affected by viruses, computer crashes etc. It is vital to save a copy/ies in a different location from where you have your original library. It is not advisable to save multiple copies of an EndNote library, it gets confused.

Go to 'File' on the EndNote toolbar, then click 'Save as', or Compressed library. You can save to a hard drive, a CD or a memory stick. EndNote comprises two files: .enl: the actual library and .data: the foundation (often found under the Documents section of your computer). Both of these need to be saved but the 'Save as' function will do this. Don't forget to give your copy a new name.

Using journal abbreviations

EndNote has some pre-set lists of journals and abbreviations for various subject groupings. These are called 'Terms lists' and may already be on your computer, again under Documents and Terms lists. If a list is not there you can upload a list:

- From the Tools menu, select Open Term Lists, and then select Journals Term List.

2. Delete all existing terms from the list (you can click and drag to highlight all terms, and then click Delete Term.
3. Click on the Lists tab and highlight the Journals list.
4. Click Import List.
5. In the File dialog, navigate to the EndNote X7\Terms Lists folder, select the list you want to use, and click Open to import the journal names and abbreviations from the file into the Journals term list.

These lists are automatically updated.

If you want to add a journal and abbreviation:

1. Click on Tools, then Terms list and then Journals list.
2. Choose 'New term', add in the full title of the journal, and then in the abbreviation 1 and 2 boxes add the relevant abbreviation
3. OR, highlight the journal title and click on edit, and edit accordingly.

You may need to do a change to the template to indicate use of the abbreviation. (see Changing aspects of the default style above).

All Endnote queries should be logged via the ICT Expert desk message system: <http://ictfaultlogging.ukzn.ac.za/>. The EndNote help screens are very helpful. Also consult the FAQs and help options at www.endnote.com.