EndNote X6: the basics (downloadable desktop version)

EndNote is a package for creating and storing a library of *references* (citations plus abstracts, notes etc) which 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 X6 will automatically appear on your Microsoft Word ribbon.

EndNote X6 is compatible with most versions of Windows; you may have to reinstall however if EndNote X6 does not appear on your Word ribbon. The license permits downloading onto private pcs. The desktop version means internet access is not required to use EndNote all the time.

A. To download EndNote onto your pc:

   1a). **If you are a staff member**: Go to My computer / Computer and from the left hand column click on UKZN-APPS. Click on the option 'Staff applications' and then 'Academic software.' Click on 'EndNote' at the next screen

   2. Choose EndNote X6 and follow the download instructions. Make sure Microsoft applications are closed (eg Word and Outlook). EndNote is already loaded in the computer LANs on campus.

   3. You may download EndNote directly onto your pc or a memory stick and then onto your pc. There is a web version of EndNote but it is rather cumbersome and limited.

   1b). **If you are a student:** Log in to ftp://softwarerep.ukzn.ac.za. Use Mozilla Firefox. From the directory list choose Academic software, then EndNote. Click on the X6install.exe option. An alternative is: https://docs.google.com/file/d/0B-AfyxTJd9kwR2VLS29uU1NEbDQ/edit?usp=sharing.

   4. There is an EndNote X6 "**Getting Started Guide**". Click 'Start', 'All programs', 'EndNote', 'Getting Started Guide'.   **Online tutorials** and **webinars** are available on the EndNote website, http://www.endnote.com , as well as online help and FAQ's which provide useful answers to problems. You can also Google your problem or query. Tutorials and webinars are free of charge. One does need to book for a webinar. A '**Help'** facility is also available on the EndNote **toolbar**.

B.   1. There are two ways to access EndNote:
   - 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 ask 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.
   If you choose to create a library you will have to name it and save it before adding references.

   3. The EndNote screen is divided into 3 parts. The left hand column indicates how many references you have, what you have recently added, and groups within the library. The middle column indicates brief details of added references, unformatted. The right hand column of the screen provides you with the reference type templates. The toolbar attached to this column provides you with tabs to: see what the full bibliographic reference looks like (preview); view attachments (attached pdfs); or attach a file of any sort eg pdf, videoclip, word document to a reference paperclip).
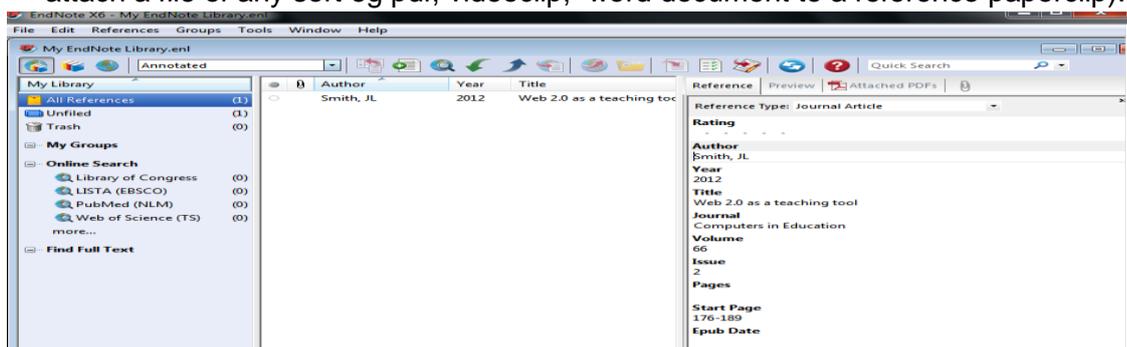
C. CREATE A LIBRARY (of references)

1. Once EndNote is loaded and opened you will see either a box with three options (first time only) or a blank EndNote screen or a three way split screen.
   - Box: click on the option 'Create a new library'.
   - Blank EndNote screen: click on File, then New.
   - 3 way split screen – you are ready to begin!
2. EndNote provides an automatic default library called My EndNote Library.enl. You can create a new one or others. If you do, give your 'library' a name and save it to a drive of choice. It is better to maintain one large library of references (a library can hold 100 000 references) and create groups. EndNote allows sorting of references by authors, titles and keywords (which you can add).
3. You can print or copy a library, email, save, or save a library to a memory stick.

Setting the citation style in your Library

4. At the top left of your main EndNote screen is a white search box – this is where you indicate the referencing style. Choose what is on the list if appropriate, or click on 'Select another style' and choose from the very long list – of general styles or styles for specific journals. Your library of references in EndNote is not saved in any particular style. Setting the style is critical at the document typing stage.

Adding references manually

5. To enter details of a reference, click on 'References' on the main toolbar and then on 'New reference'. An alternative is to click on the 'Add new reference' icon: (a white page with a green circle/white + sign). First choose the reference type eg book, article that you are working with. The 'Reference type' menu is located below the toolbar. Click on the down arrow for the menu.

6. A template particular to that reference type will display. The first option (field) called Rating, allows you to rate the item in terms of importance on a scale of 1 to 5. Click on the appropriate dot. Fill in as many details as you can – in the line below each named option. For authors, put surname first, then comma and then full names or initials. *Only one author can be entered per line*. Check your spelling, typing etc. Leave out punctuation at the end of the fields, with the exception of the full stop after the author initials. If your author is a corporate body e.g. Durban City Council you must 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. Either type details or copy and paste.

7. Once you have completed the details of a record, click on the lower 'X' (of the template screen within the main screen), usually grey but sometimes red, as if to close the screen. A message will display asking you if you want to save, click 'Yes'. Brief details of your reference will be displayed in the middle column of the screen. Repeat the exercise for each reference. When looking at the centre column you will see a grey dot to the left of each reference indicating a reference has been added but not opened or used. Once you have opened a reference, this dot will change to white. You can manually click on a dot to change the status of a reference to opened.

8. To see what the reference citation will look like in a bibliography, choose the style (see section F of this handout) and then in the top of the right hand column click on 'Preview.'

Editing and updating references

Double-click on one of the references entered. The Reference template will open and the details in any field can be edited or changed. Fields can be added. When the changes have been made, save the changes: close the reference screen via the grey 'x', and click 'Yes' to save.

Deleting references

Click once on the reference in the EndNote library Window to select it. Go to the References option on the EndNote toolbar and choose 'Move references to trash' OR right click and choose 'Move references to

trash'. If you delete a reference by mistake, click on Trash to see the references, highlight a reference, right click on it and then choose 'Restore to library'.

Adding online references by <u>exporting </u>from a database

> **NB!** Exporting is not possible from all databases such as UKZN library (see attachment for adding UKZN connection file) or the old version of Sabinet. (See end of item 13 on this page for instructions with the new-look Sabinet).

9. Have EndNote open. Then from the UKZN Library databases list, choose a database and conduct a search.

10. You can export single or multiple citations. When you have selected an article/articles, find and click on the 'Export' / 'Export citation' button. If given the option of '<u>Export citation and abstract</u>', choose that option. You need as much detail as possible in your Library. You will often be asked to confirm the referencing management package you are using: select EndNote or the option that includes EndNote. Your citations and URLs will appear in your EndNote reference screen. If you wish to add the full text of documents to the citations, this is a separate step / process (see below).

11. To add citations from Google Scholar, click on the 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.

12. <u>Check</u> your imported references by double clicking on the reference to open up the template. If any details are missing add them while you still have the search result open. Watch for capitals, numbers or symbols that don't belong in a reference.

13. In a database, if no full text was available for a citation, the URL link that is exported to your EndNote Library may not always lead you to the full text article. When there is a 'sfx' or 'Check for full text' link associated with that reference, go to A-Z of E-Journals list on the Library website and search for the online journal and article.

The new look Sabinet permits direct exporting to Endnote but check the details, sometimes field information is missing. For example the journal title often appears as alternate title. Cut and paste it into title field.

For exporting from Sabinet, use the new version of Sabinet. In Sabinet, click on the title of a reference to open up the export options. Once you have clicked on 'Export to EndNote, choose the option to 'open' the reference not 'save'. Save the pdf and follow instructions for attaching a file. The current / old look Sabinet requires a filter download which does not usually work. Otherwise manually add references to your EndNote library by blocking and pasting into the template.

Saving full documents and associated material to the 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 three ways to do this:
> **A.**
- **Save the document accompanying the citation to your desktop first or a drive** then attach it to your EndNote library reference (be careful how you label the document!).

It is probably best to save the document under the author surname and year as the EndNote Library is generally in alphabetical order by author. Watch for similar surnames

- (i) Go to your EndNote library and highlight the parent article. Click on the paperclip icon in the top of the right hand column which will enable you to go to where the file you want to attach is located. Locate the attachment and double click on it. The attachment appears in the right hand column.

  Click on the 'open pdf' icon ⧉ and then click on the save icon. Close the pdf or document screen (via the grey 'x') and click 'yes' to save. The attachment is now partnered to the citation. A paper clip appears next to the citation in the main part of the EndNote screen indicating there is an attachment

- (ii) An alternative is to go to 'References' on the EndNote toolbar, then 'File attachments' then 'Attach file'. Find the relevant file and then double click on 'open' to save and attach it to the parent record.

- Once you have saved your document, to check the attachment is secure, open the template of the relevant citation (double click on the citation) and locate the 'File attachment' field in the template.

- If you want to delete an attachment, open the template, go down to the 'File attachment' field, highlight the file and then click on 'Clear'.

B. Once you have a reference in your library, highlight it and then click on the icon in the middle of the main toolbar that is a globe with a red arrow and a page:

. This icon will search the Web looking for the full text availability. Beware! It is not foolproof. It should locate those fulltext documents that are freely available or available via a UKZN subscription

- If it is available, you will be told so in the **left hand** column of the EndNote page. The full text eg pdf will open up in the right hand column

- Click on the first icon (open pdf) on the toolbar of the right hand column: ⧉ which will open the pdf full screen

- Now click on the save pdf icon and the pdf will be attached to your citation and included in your EndNote library for easy retrieval. Close the pdf screen and click 'yes' to save this amendment to your citation

- In the centre column of your library that displays your references you will see the paperclip symbol to the right of the reference that indicates there are attachments to that citation.

Adding online references by <u>importing</u> from a database within the EndNote screen eg PubMed

NB! This is limited and <u>not always successful</u> so the above instructions for going into a database outside of EndNote is preferable. This option is useful for importing references from the UKZN library catalogue.

EndNote provides a pre-selected list of Library catalogues and databases eg PubMed, Web of Science, Ebscohost. a) <u>Before you start the online search</u>, go to the top left-hand corner of your EndNote library window, click on the 'Online Search Mode' button (the globe or third button). If you do not click on this button you will bring all the references from your online search into your EndNote library. This is not the preferred option for getting online references into your EndNote library, rather go via the Library's webpage.
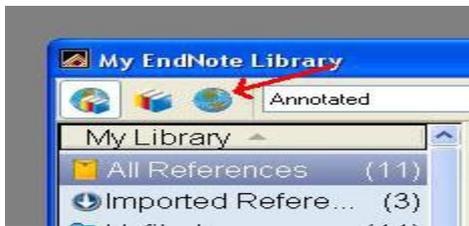
b) Either click on the 'Online search' icon button ⬚ OR go to 'Tools' then 'Online search. A list of available databases appears, find and click on the desired one. EndNote needs an internet connection to access the database/catalogue. c) An Online search box opens at the top of the middle column of the EndNote screen. Do your search, choose how many references you want to import in the records box that

appears by highlighting wanted items. d) Click on the 'Copy to local library' icon ⬚ . This will add the selected references to your EndNote library. Close the screen with the results from the database/catalogue. EndNote will ask if you want to 'discard all online references', click OK.

To return to your EndNote library, click on either 'Local library mode' (the books or second button) or 'Integrated library and online search mode' (books/globe or first button).

To close the search box at the top of the EndNote screen, click on 'Hide search panel' on the top right   of the tool bar.

D. CREATE REFERENCE GROUPS FOR A PARTICULAR PURPOSE

1. On the EndNote toolbar, click on 'Groups' and then 'Create group', giving the group a name in the left hand side panel of the Endnote screen

2. To add references to a group, highlight the references and then drag and drop then 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. Your references will be added to that group, but will still also remain in the overall list of references.

3. **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 names of authors, keywords etc 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.

5. On the Word toolbar you can also *edit a citation* and update citations and bibliography. Highlight the reference (needs to be in dark blue), click on 'Edit and manage citations', and then choose the relevant option such as 'exclude author' from the 'formatting' box in the bottom half of the screen. To add in page numbers put numbers in the pages option. If this does not work, use the suffix option, and precede the page number with a colon or p or whatever your style prefers. When using the edit function you must add in spaces in the edit box.

   EndNote tends to order multiple references in a single citation alphabetically. To change the order 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. From the left hand column under Citations, click on Sort order and then tick against the option you prefer from the list provided. If the option you want is not represented, click on 'other' and alter boxes accordingly.

6. 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.

7. To update global changes to references, use the update 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.

G. CREATE A BIBLIOGRAPHY INDEPENDENT OF A WORD DOCUMENT

- For a bibliography of particular references: Choose the required style. 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

- Drag-and-drop to instantly transfer a bibliography to a word processing document
- Export references from a library as RTF, Text Only, HTML, or XML
- Preview and/or Print references from EndNote.