

## EndNote XV (fifteen): 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. Full text documents, figures, tables etc can be added to the references as attachments.

EndNote XV is compatible with most versions of Windows; you may have to reinstall however if it does not work the first time.

### A. To download EndNote onto your pc:

1. [Http://softwarerep.ukzn.ac.za](http://softwarerep.ukzn.ac.za). Login with your varsity Novell login.
2. Under Academic software – choose EndNote and follow the download instructions.  
EndNote is already loaded in the public LANs on campus.
3. You may download EndNote onto your home pc or laptop or a memory stick and then onto your laptop or pc.  
There is a web version of EndNote but it is rather cumbersome and limited.
4. Once EndNote XV is installed on your pc, the EndNote XV “**Getting Started Guide**” (96 pages) is available: click ‘Start’, ‘All programs’, ‘EndNote’, ‘Getting Started Guide’. **Online tutorials** and **webinars** (live classes) are available on the EndNote website, <http://www.endnote.com>. Tutorials and webinars are free of charge. One does need to book for a webinar. A ‘**Help**’ facility is 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. Close the EndNote web screen. 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 right top section indicates brief details of added references, unformatted. The bottom right of the screen may be split in two. Firstly you are provided with an option to see formatted references for a bibliography for a particular style (Preview), or add a pdf and edit a reference (Pdf and quick edit) or search across your library (Search). When you choose the ‘Pdf and quick edit’ the screen splits in two so you can see the template for the current reference.



## C. CREATE A LIBRARY (of references)

1. Follow the steps above to access Endnote. If the Endnote Web screen appears, close it. Either you will see a box with three options or a blank Endnote screen.
  - Box: click on the option 'Create a new library'.
  - Blank EndNote screen: click on File, then New.
2. 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 screen of references 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.

### Adding references manually

5. To enter details of references, click on 'References' from the tool bar and then 'new reference' or the new reference icon 
6. At the next screen, to the right of the box called 'Reference type', choose what kind of reference it is that you will be dealing with eg book, journal article etc.
7. A template particular to that type of item will display. Fill in as many details as you can – below each field 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.
8. Once you have completed the details of a record, click on the 'X' to close the screen. A message will display asking you if you want to save, click 'Yes'. Another option is to click on 'File' then 'Save' on the toolbar. Then from File click on 'Close reference' to get back to the full list of references. Your reference will be displayed on the screen. Repeat the exercise for your references.

### Editing references

Double-click on one of the references entered. The Reference window will open and the details can be edited. Any details can be changed and fields added. When the changes have been made, close the reference, and click 'Yes' to save.

### Deleting references

Click once on the reference in the 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 'Restore to library' under the References option OR right click and choose 'Restore to Library'.

## Adding online references by exporting from a database

**NB!** Exporting is not possible from all databases eg Sabinet and the UKZN catalogue records have to be manually added to your Endnote library. You can download filters to do an online search from within Endnote of the UKZN Catalogue (see handout of additional notes).

9. Make sure Endnote is open. Go to 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, find and click on the 'Export' / 'Export citation' button. If given the option of 'Export citation and abstract', 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. 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 process (see below) and you will need to save the pdfs etc one by one.
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. Check 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. 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 other option is to save the pdf while doing your research.

## 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 two ways to do this:

Save the document to your desktop first or a drive (be careful how you label the pdf!). Save the pdf under the author surname and year as the Endnote Library is generally in alphabetical order by author. Watch for similar surnames.

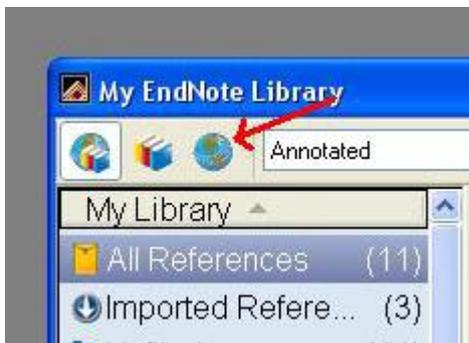
- a) Go to your Endnote library, click on the parent article to highlight it. On the bottom of the Endnote screen click on 'pdf and quick edit', then the arrow to the right of the paperclip. Click on 'attach pdf'. Locate the document (not necessarily a pdf) and double click on it. The document is now attached. This can be checked in the template of the record on the bottom right of the Endnote screen. A paper clip appears next to the citation in the main part of the Endnote screen indicating there is an attachment.

- b) Once you have saved your document, open the template of the relevant citation (double click on the citation) and choose the 'File attachment' field in the template. From the tool bar, click on 'References', then 'File attachments' and then 'Attach file'. Find the file and double click on it. You will see the attachment appear in the template. Save the amendments by clicking on the grey 'x' in the top right hand side of the page, or, click on 'File' on the toolbar and then 'Close reference'.

### Adding online references by importing from a database

This is limited and not always successful so the above instructions for going into a database outside of Endnote is preferable.

Endnote provides a pre-selected list of Library catalogues and databases eg PubMed, Web of Science, Ebscohost. Before you start the online search, 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.



There are two ways of accessing this online search. Either click on the Online search icon

button  OR go to 'Tools' then 'Online search'. A list of available databases appears, click on the desired one. Endnote needs an internet connection to access the database/catalogue. An Online search box opens below your references' screen. Do your search, choose how many references you want to import in the records box that appears. Click OK and the references will import automatically.

Highlight the one's you want and then 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).

### D. CREATE REFERENCE GROUPS FOR A PARTICULAR PURPOSE

12. 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
13. To add references to a group, highlight the references and then 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.

14. **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

15. Open a Word document or create a Word document and open the Endnote option on the Word ribbon.
16. Choose the referencing style (middle box in the Endnote section of the Word ribbon).
17. At the point in the document where you need to *enter a reference*, click on 'Go to Endnote' from the Word ribbon
18. 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'.

19. 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.

20. 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.

## 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. JOURNAL ABBREVIATIONS

If your style requires journal abbreviations, go to 'Tools', then 'Open term lists'. Click on 'Journal term lists', then 'Lists'. Choose 'Import list', and a list of collections of journal names will appear (in the C drive), highlight the term list you want e.g. Bioscience or Law. 'Open' and the list will automatically be added to your Endnote Library.

If you do not see any lists, go to the Endnote Website: [www.endnote.com](http://www.endnote.com), click on 'Support and services' from the red toolbar, and under the Downloads option, the last item is Endnote term Lists. This does require winzip. Then go to your C drive, click on Program files, Endnote XV and then Term lists and check that the list has downloaded. Now go back to Endnote, click on Tools, Open term lists, Journal term lists, Lists, Import list and then click on the list you want to import it into Endnote.

To set the Endnote Library to abbreviations, go to 'Edit', 'Output styles', chose your style, click on 'Edit the style' and then go to 'Journals'. You are offered several levels of abbreviations. Move the dot from 'Full journal name' to 'Abbreviation 1' (fullest form of abbreviation). Note that you will be saving a copy of the style because you have altered it. You *must* save this copy or else you will have to repeat the process each time you use Endnote.

## H. CREATE A BIBLIOGRAPHY INDEPENDENT OF A WORD DOCUMENT

- Drag-and-drop to instantly transfer a bibliography to a word processing document
- Highlight required references, right click and choose Copy formatted and paste them into a word processing document
- Export references from a library as RTF, Text Only, HTML, or XML
- Preview and/or Print references from EndNote.

All Endnote queries should be sent to him via the ICT Expertdesk message system: <http://ictfaultlogging.ukzn.ac.za/>.

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