



# EndNote X6 Essentials

Library EndNote resources page:

<http://as.exeter.ac.uk/library/using/help/general/information skills/referencingsoftware/>

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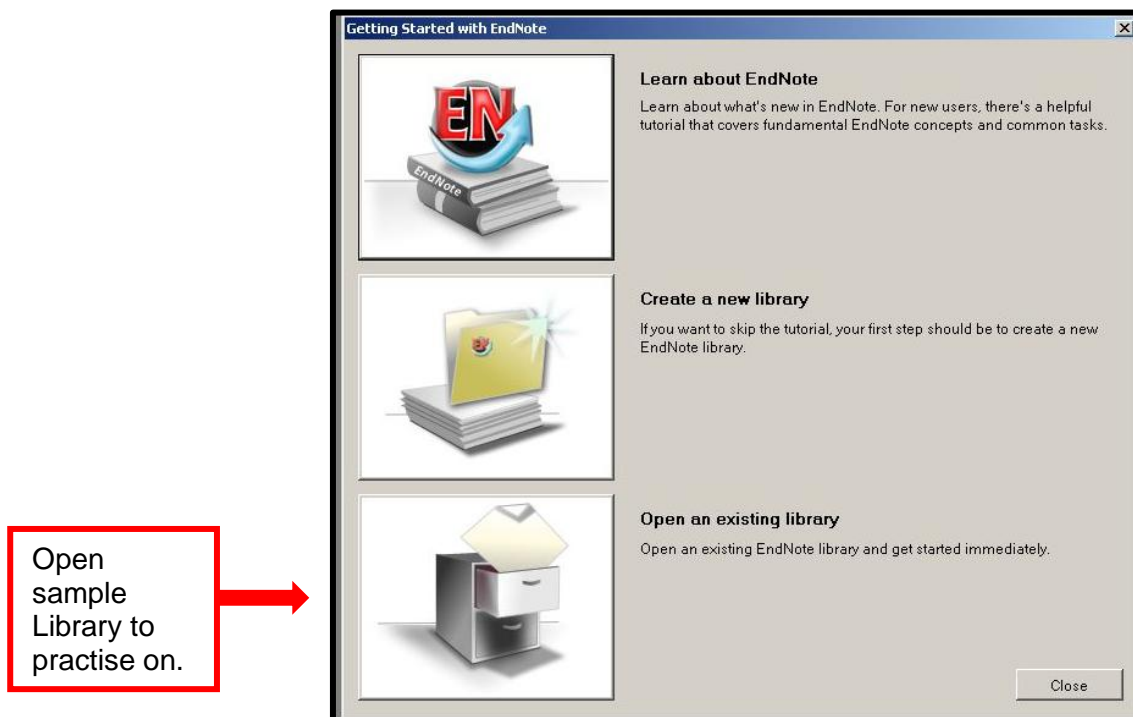
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## Getting started

1. Click on the **Start** button at the bottom left corner of your screen.
2. Click on **ALL programs**
3. Click on **Microsoft Office Choose EndNote Program**.

**In some clusters, EndNote is not found under Microsoft Office, but has its own folder – you will see this when you click on All Programs.**

4. You will be presented with the EndNote X6 welcome screen.



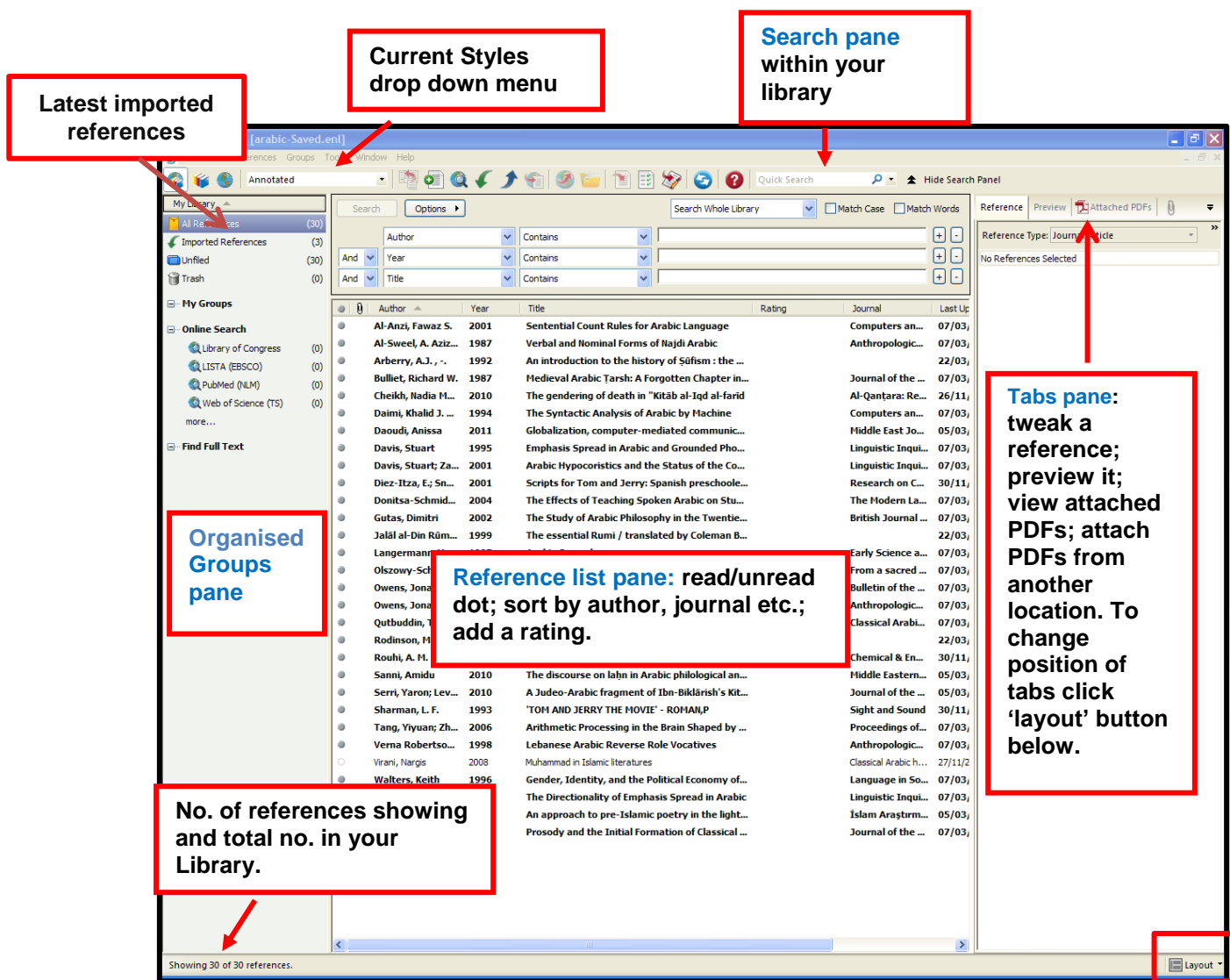
When you open EndNote, you will be asked whether you would like to create a new library, or open an existing one.

To create a new library, just give it a file name and save a copy as an **.enl** file. If you are working on a University cluster, remember to save it to your University filespace (U drive) rather than the C drive, otherwise you will lose it when you log out.

EndNote comes with a sample library, which we can practise on. Click on 'Open an existing Library'. Look in the **program files** for EndNote **X6**, locate the **Examples folder** and double click on the file named **Sample\_Library.enl**. If you wish to change the name of your new library, click in the File name window, delete the suggested name and enter a new name for your new library. The extension ".enl" stands for "EndNote Library". EndNote will add ".enl" automatically.

## Your EndNote Library window

Familiarise yourself with the different panes on a typical screen:



- o The **File** dropdown menu allows you to open, close, save and create EndNote libraries. You can also import individual PDFs or folders of PDFs already on your PC etc.
- o The **Edit** menu:
  - Cut copy and select references.
  - Define the output styles that format the display of references.
  - The Preferences option allows you to configure the software to your needs.
- o The **References** menu:
  - Create, edit and delete references
  - Find duplicates
  - Find full text from a limited set of resources.
  - You can also work with URLs (online files) and file attachments (PDFs)

## Adding new references to your EndNote Library from a database

Typically, we first log into a database via the Exeter Electronic Library webpage, and **then** export the search results to EndNote.

### *Exporting references from Bibliographic Databases: an exercise*

While this exercise uses **ISI Web of Science**, many of the databases available will transfer **directly** to EndNote. Typically, they will have an option to “**mark**” or “**add**” records of interest, and then you can look at the marked items and find an export option. Ask your Subject Librarian for advice regarding specific databases, and check the EndNote webpage on the Library site. It’s also a good idea to **register** with this site – e.g. for enabling EndNote Web syncing, and receiving new article alerts.

Web of Science is set up for **direct** imports, (you can always tweak these after the import, if you wish).

1. Make sure that you have EndNote X6 and your research library open.
2. Go to the Electronic Library <http://as.exeter.ac.uk/library/resources/e-resources/elibrary/>
3. Choose General’ as subject, click ‘Find resources’
4. In the list click ‘ISI Web of Science’
5. Click the third tab **Web of Science**.
6. Type in a search string. I’ll use “**Tom and Jerry**” in the search window.
7. Click **Search**.
8. You will get a list of all relevant articles. For **each** useful reference, you can click on the selection box. You can also select **a range** of references quickly – scroll to the Output Records section at the bottom to look for the link to add all of the displayed records at once, or type a range of record numbers to include.

## Web of Science results:

The screenshot shows the Web of Science search results page. Three red boxes with arrows point to specific elements:

- Box 1:** "Click to add a single record at a time...." points to a small square icon next to the first search result.
- Box 2:** "Click Save to EndNote." points to the "ENDNOTE" button in the "Step 3" export options.
- Box 3:** "Or choose an option to select a group of records." points to the "Selected Records on page" option in the "Step 1" output records section.

The page displays search results for "JOURNAL OF ALGEBRAIC GEOMETRY" and "Coordination revisited - A constraint handling rule approach". The bottom of the page shows the "Output Records" section with three steps: Step 1 (Selected Records on page), Step 2 (Authors, Title, Source), and Step 3 (How do I export to bibliography software?).

9. Click **Save to EndNote**.

10. You will see an ISI processing screen, and then be prompted to open the file using a 'Direct Export Helper'. Click **OK**.

The screenshot shows the "WEB OF KNOWLEDGE" processing screen. The text on the screen reads:

**WEB OF KNOWLEDGE<sup>SM</sup>** | DISCOVERY STARTS HERE

**Processing Records**

Please wait while your request is processed.  
(Note: Depending on the number of records, this may take a few moments.)

Product: Web of Science  
Selected action: Export to Reference Software  
Processing 3 records:  
3... Done.

**Export** the "Export" process does not start automatically, then click "Export."  
**Back to Results** When you are done exporting the file, click "Back to Results."

(If a dialog box appears, click the box next to "Do this automatically" and click **OK**.)

11. The references will be transferred to your library as an imported references group. Note that the transfer does not include full text.

The newly imported references are displayed in the 'Imported References' group **AND** added to 'All References' in the summary screen, as shown.

## Importing references from Google Scholar

**Google Scholar** can also be customised to work with EndNote:

You will need to configure Google Scholar to send references to EndNote. Then you will be able to send references to EndNote by clicking on the "Import into EndNote" link.

1. Go to the Google Scholar home page at <http://scholar.google.com>
2. Click on the "**settings**" link (next to the **cog** icon in the top far right of the screen).
3. Under "**Bibliography Manager**" select the option "Show links to import citations into" and choose "EndNote" in the drop down box.
4. Click on the "**Save Preferences**" button.

### Follow these steps to import search results into EndNote:

1. After performing a search on Google Scholar click on the "**Import into EndNote**" link for the reference you want to import.
2. If you are presented with a window asking if you want to "Open" or "Save" the file, choose to **open** the file.
3. If you have an EndNote library already open, the reference will be saved into it. If not, a "Select a Reference Library" window will appear, use this window to select the EndNote library you want the reference imported into.



## Editing EndNote Library references

### Selecting and opening a reference

If you want to work with a reference, first select it. You can then view its contents, copy, cut, delete, or edit it.

To select a record, you can:

- Click on the reference using the mouse
- Use the arrow keys
- Type the first few letters of the field by which the library has been sorted.

You can then **double click** on the selected record to open it or drag the selected item to a group or add a PDF.

### After an import you may want to tweak the reference because:

- Title field – all titles in all capital letters or coding instead of punctuation.
- Reference type - may show "Generic" instead of a Newspaper or Journal article. It won't look right in your bibliography.
- Keywords - you may need to press the *Enter* key after each keyword to put them on separate lines, so that EndNote will recognise each separate keyword. You can also use a semi-colon to separate keywords.

### At this stage you can also:

- Check the notes field and delete any information you do not require.
- Manually add useful information such as the viewing date, database name and vendor
- Ask EndNote to download available full text articles from a limited range of online sources. (page 10)
- Manually download PDFs and drag them to the relevant records (page 11)
- Import PDFs you already have (page 11)
- Manage your references by creating groups to sort them. (page 12)

Close a record by using the **Control-W** shortcut, or by clicking on the Close button in the right corner of the grey toolbar.

To go back to showing all the references, click **All references** in the Groups window.

You can **sort** references by clicking on a **column heading** such as Author, Year, or Title.

## Finding Full Text for a Reference

EndNote can attempt to locate full text files from these sources on the Web (works best on campus):

- **ISI Web of Knowledge Full Text Links**
- **DOI (Digital Object Identifier)**
- **PubMed LinkOut** – for medical and science resources

If found, EndNote downloads and attaches the files to the references. You can search for up to 250 records at a time this way.

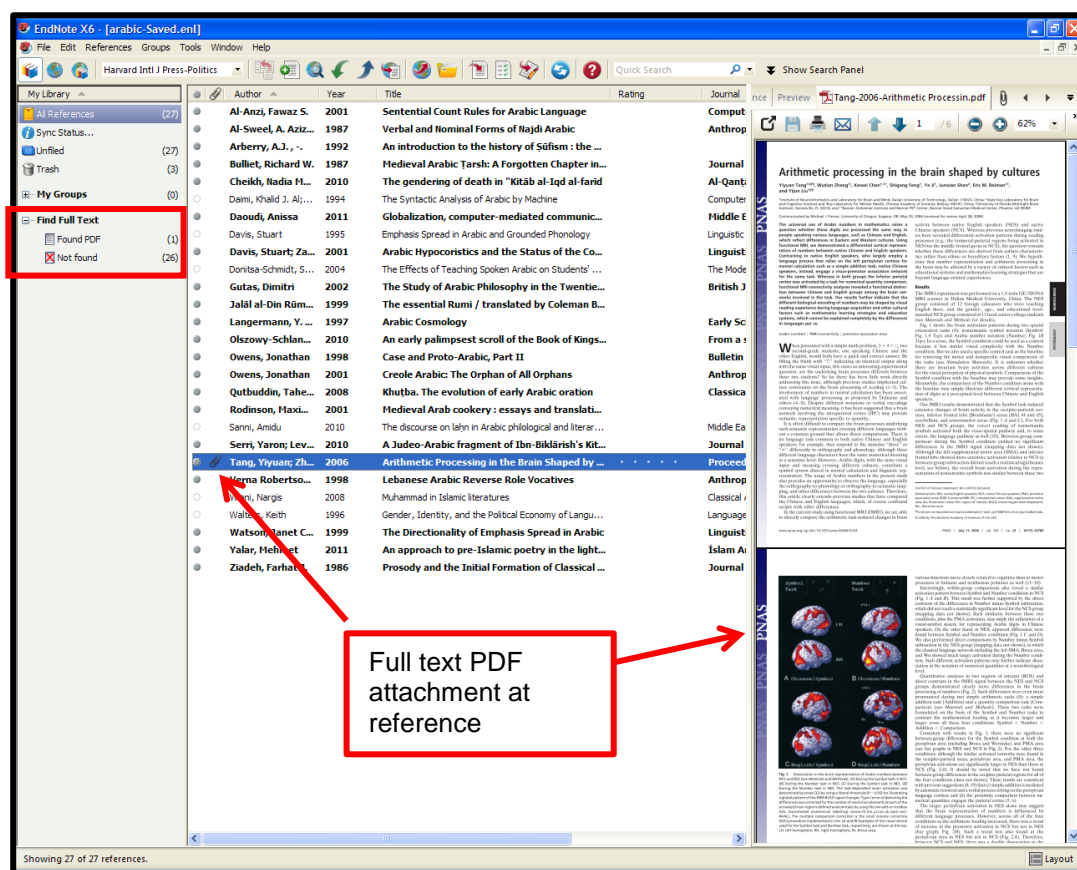
You may need to turn on the Pubmed search option.

1. Click **the Edit menu**.
2. Click **Preferences**.
3. Click **Find Full Text**.
4. Click **Pubmed LinkOut**.
5. Click **OK**.

### To search for the full text:

1. **Control-A** to select all of the references.
2. Click the **References** drop down menu
3. Click **Find Full Text, then Find Full Text again**.
4. Click **OK** to accept the copyright warning

The **Find Full text** in the Groups pane reports the progress of the search. If EndNote cannot find the full text file, it will sometimes be able to attach the URL of the provider's Web page for the article for easier future access. EndNote will attach any found full text.



## Manually adding full text articles and other attachments

If EndNote cannot automatically retrieve the full text you can manually save the full text from databases to the desktop of your computer, and then add the PDFs and other file types into the record.

1. Select the record by clicking on it
2. Press **Control-Alt-A**
3. Find the PDF or other format file on your computer
4. Click **Open**. The file will be attached to your EndNote reference and library.

Note: if you attach Word or Excel files, please be aware that EndNote makes a copy of the original file and adds it to the DATA folder. Any changes made to the original file will not be saved to the copy in the DATA folder. Do not attach files that you haven't finished modifying.

## Importing PDFs from your files

EndNote X6 can also import folders of PDFs you already have and attempt to find the bibliographic (publication) information for the more recently published articles. This will only work with PDFs created with current forms of software and where the publishers have embedded bibliographic data.

### To import a folder of saved PDFs:

1. Open your EndNote library.
2. Click on **File**.
3. Click on **Import**.
4. Click on **Folder**.
5. **Import Options > PDF** should already be selected. If not, use the dropdown menu to select **PDF** or **Folder**
6. Check the Duplicates option. Select your preference.
7. Click **Choose**
8. Find the folder of PDFs and click on it.
9. Click **OK**.
10. Click **Import**
11. Any PDFs with embedded DOI data will be imported to new records with basic bibliographic data.
12. All others will be added to individual default journal article records and the file name of the PDF will be listed in the title field. You will need to manually add bibliographic data for those references.

If you choose to import duplicates to a duplicate library, EndNote will create one and report the number of standard and duplicate imports. Note that after transfer, EndNote may display the duplicate library – it is important to check the library's file name at the top of the screen.

## Opening attached files

1. Select the record or hold down the control key to click and select several references.
2. Click the **References** dropdown menu.
3. Click **File Attachments**.
4. Click **Open file**.

## Managing your references: Creating groups

**Groups** make it easy to organise a large library into folders or subsets for later access. You might want to create a group to gather the research materials for a particular assignment or journal article. Some researchers use groups to collect resources for each chapter in their thesis.

**Tip:** Create a group to collect any imported items that you do not currently have in print or electronic full text in your research collection. This will make it easier to identify items that need to be obtained by interlibrary loan.

1. Click the **Groups** dropdown menu.
2. Click on **Create group**.
3. Call the new group **Need full text** and hit **Enter**.
4. Click the **Not Found** group that resulted from the **Find Full Text** search.
5. **Control-A** to select all of the references if they aren't already highlighted.
6. Scroll to the bottom of the summary screen.
7. You can add the highlighted references to the group in a number of ways:
  - a. Drag and drop them onto the group **Find Full Text**.
  - b. Click the **Groups** dropdown menu, click **Add References To**, and select the group **Find Full Text**.
  - c. Right click on a selected item, click **Add References To**, and select the group **Find Full Text**.
8. Click on the group name to see its contents.

### Notes:

- You can add a reference to a particular group only once. However, you can add that reference to any number of groups.
- Deleting a reference from a custom group does not delete it from the library.
- Deleting a reference from a library also deletes it from all groups in that library.

## Backing up your library and attachments

### EndNote on more than one computer

If you want to use EndNote X6 on more than one computer:

1. Create a Research directory on a USB Flash Drive
2. Keep your current Word files, PDFs and EndNote library in that directory.
3. Copy the working files to the computer you will be using.
4. Copy them back to the Research directory on your flash drive when finished.

You can then copy that entire directory to a CD or DVD to back all of your research up.

Using the files on the USB prevents accidents like over-writing the most recent library with an older one, and stops you from “breaking” links between EndNote and Word files.

### Create a compressed file

You can create a backup of your library and attachments by clicking

1. Click the *File* dropdown menu
2. Click *Compressed library*
3. The default settings will back up all of your references and attachments. Click *Next*
4. Click *Save*.

The created file (**.enlx** extension) can be emailed or saved to a flash drive as a backup.

### Back up to EndNote Web

You can also use the web version of EndNote (**ENW**). You would typically use **ENW** in the following ways, syncing with **ONE** library for a 1:1 desktop:web set up.

Any changes made in **ENW** will affect the desktop version and vice versa. **ENW** is used:

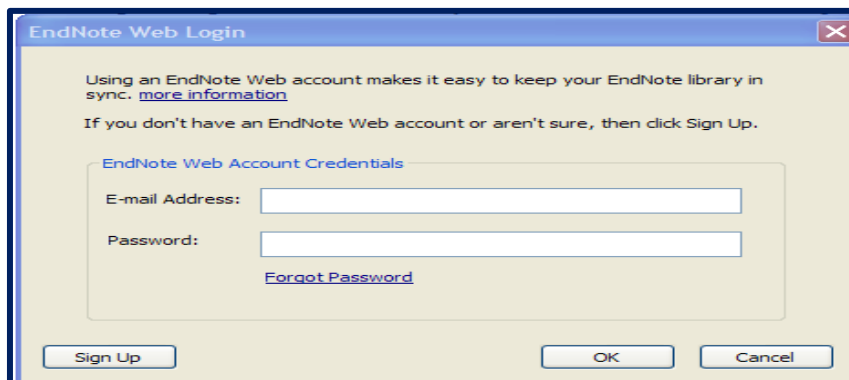
- as a backup
- as a way to access all your references when you are away from your main machine but have access to the internet
- as a way to record new references when you are out and about and transfer them back to your main machine
- if you are working from a PC that doesn't have EndNote installed

Keep in mind **ENW** has a more limited functionality. With X6 you can synchronise your EndNote Library with Your EndNote Web Library. To do this, you must register on **ENW** – (you may have to install an update before you can use **ENW**):

1. Click on the sync button:



2. A dialog box will appear:



1. Click the **Sign Up** button to go to a User Registration dialog.
2. Enter an e-mail address in the User Registration dialog. Retype your e-mail address, and then click the **Continue** button.
3. Enter your personal information in the required fields on the next User Registration form. For example, enter your name, a password, and a title.
4. Select the appropriate radio button to Opt in or Opt out for e-mail communication.
5. Click the **I Agree** button indicating that you agree to the Terms and Conditions.

You do not have to enter your e-mail address and password each time you sync your references between *EndNote* and *EndNote Web*.

- You can update your *EndNote* library with your *EndNote Web* library whenever you open or close your default *EndNote* library.
- You can have *EndNote* automatically begin the Sync process every 15, 30, or 60 minutes (or manually if you prefer).

To access **Sync Preference**, go to the Edit menu, select Preferences, and then click Sync in the list of preferences.

## Using EndNote with Word 2010 : Output styles.

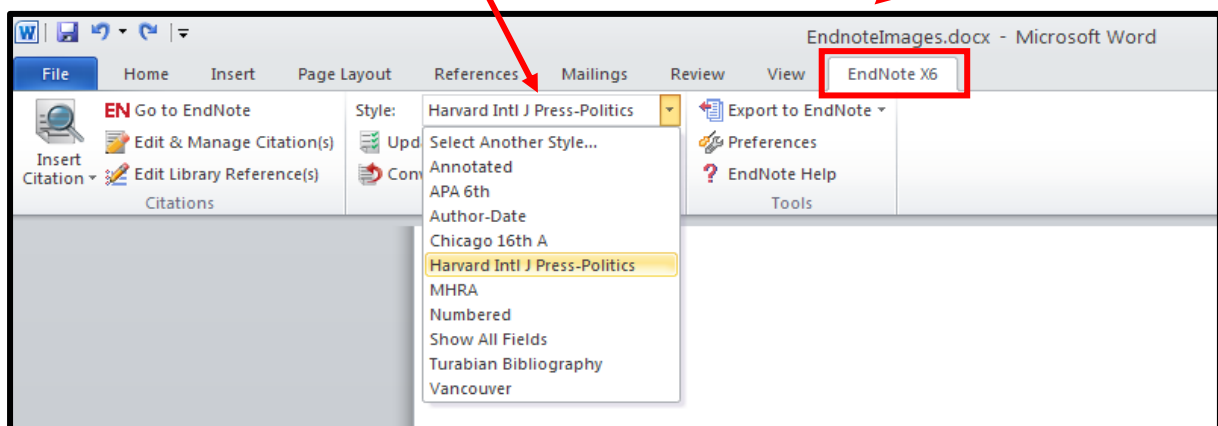
An **output/bibliographic/referencing** style determines how the selected reference will be formatted and displayed in Word. Please check with your department to see if there is a preferred style. EndNote X6 has 5,000 included styles.

### Activating a style within EndNote:

1. Click the **Style** drop down menu (the drop-down box in the top left).
2. Click **Select another style**.
3. Scroll through and click the style you wish to activate.
4. Click **Choose**. The style is now available and active within EndNote.

### Activating a style within Word 2010:

1. Start Microsoft Word 2010.
2. Open a new document.
3. When you install EndNote X6 onto your computer, it automatically adds the necessary EndNote tab to the tools in your Word 2010 software. Click on the EndNote X6 tab.
4. Click the Style drop down menu.



5. Click **Select another style**.
6. Click the '**Name**' or '**Category**' headers to sort the styles alphabetically.
7. Click the first style, then type the first couple of letters of the style name to jump down the list.
8. Type e.g. **amer**
9. Click the style you wish to activate. For this example, find and click on **Amer Economic Review**.
10. Click **OK**.

If you need to change the style of your bibliography at a later date, use the Style section of the EndNote X6 tab to choose an active style or activate a new one. EndNote X6 and Word 2010 will automatically reformat your document.



## Inserting citations into the text


Word and EndNote can work together so that you can create a Word document with correctly formatted citations and a bibliography. This feature is called **Cite While You Write (CWYW)**.

You will be able to concentrate on writing your essay or thesis, with the knowledge that EndNote will handle the correct punctuation and formatting of your references.

1. Make sure the EndNote library that contains the references you wish to cite is open. For the example and exercise below, we will use our **sample** library.
2. Open a new Microsoft Word 2010 document.
3. Type in the following code to generate some random sentences we can work with:

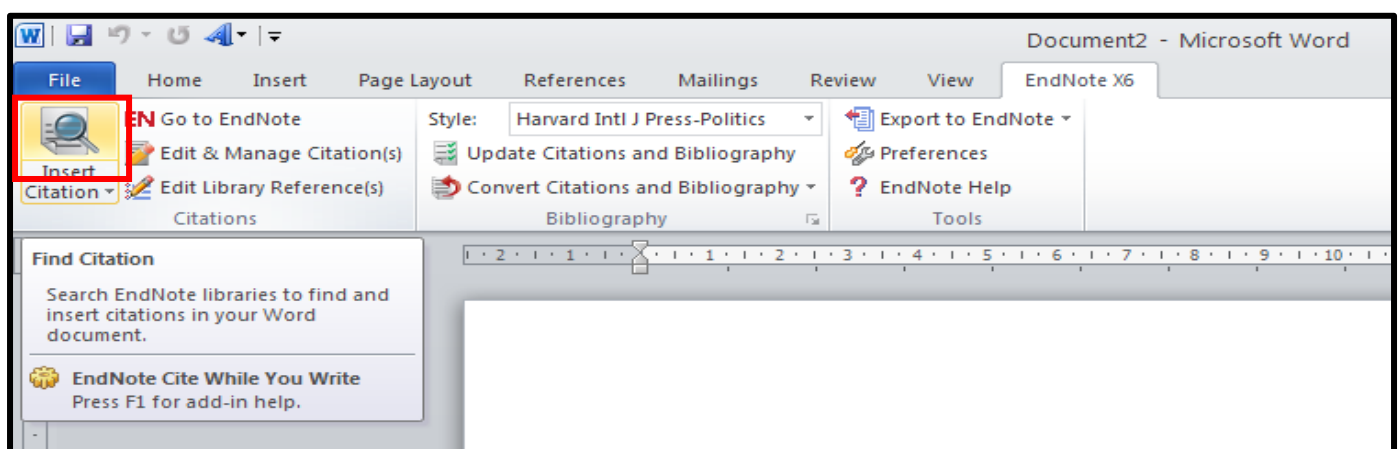
**=rand(2,5)**

4. Press **Enter**.
5. Click at the end of the first sentence.

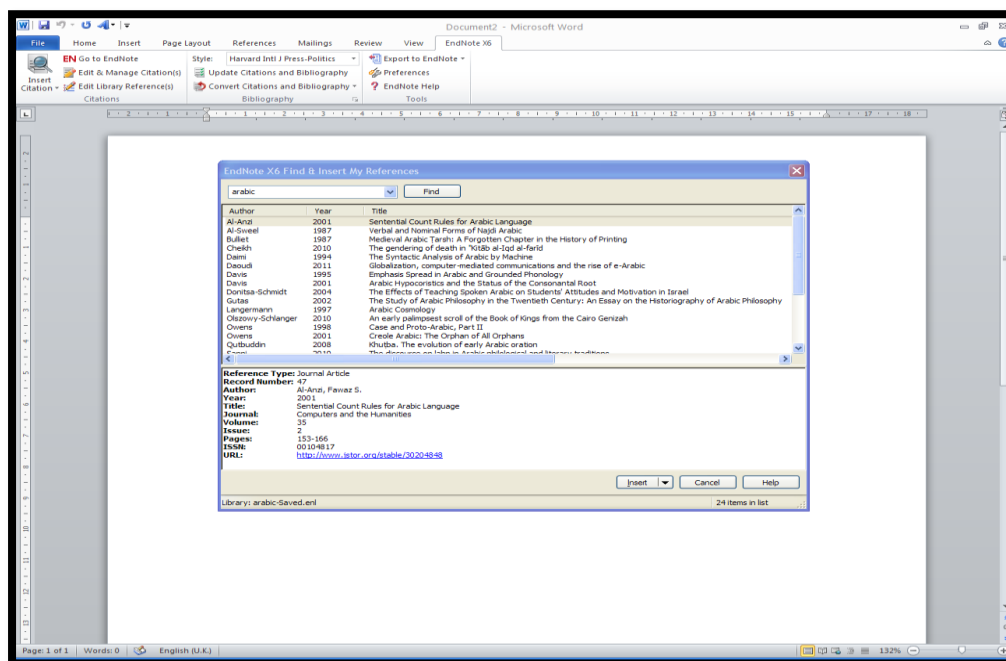
EndNote allows you to insert references in a number of ways. If you are comfortable switching between screens using Alt-Tab, you can also select an item from EndNote's summary screen and use the Insert Citation icon  to drop the reference into the Word document.

You can also use the **EndNote X6** tab of the tools ribbon.

6. Click on the **magnifying glass** icon above 'Insert Citation'



EndNote displays a Find & Insert My References dialog window.



7. Type an **author's last name**, **keyword** or **year** into the "Search for" box. For this example, type **sonar** and click **Search**.

EndNote compares the identifying text to your EndNote references and then lists the matching references. When multiple references match the search, they are listed so you can identify, highlight, and insert the appropriate reference.

8. Click on a reference to select it. If several papers might be relevant for an in-text citation, hold down the **Ctrl** key and click on the references you wish to cite.
9. Click **Insert**. A single reference will be inserted into the text within its own bracket; multiple references will be inserted into a bracket, sorted according to your chosen output style, which will be discussed later.
10. Once the bibliography has been generated, the in-text citation will list the papers in an order specified by your output style.
11. Keep their EndNote libraries and Word documents in the same file.

Do not move this file out of that directory later. You may break the links between EndNote and Word and strange things may happen to your bibliography and in-text references.

You can quickly customise a formatted citation's appearance by:

- moving the author name out of the brackets
- hiding the author name or date
- or hiding the in-text reference completely

To do this:

1. Right-click on the citation to select it.
2. Scroll down the pop-up menu to **Edit Citation**.
3. Click on the option you need.

## Adding text and pagination

You may wish to modify citations to add pagination details or "see also" references.

The following modifications are available:

Sample citation	Bender's discovery (Bender, 2004)
Prefix	Add preceding text, such as "Cited in " <b>Make sure you leave a space <u>after</u> the text</b> e.g. the discovery (as cited in Bender, 2004) e.g. the discovery (see Bender, 2004)
Suffix	Adds following text. <b>Use this</b> to add page numbers after the citation. <b>Make sure you put a space <u>before</u> the text</b> e.g. the discovery (Bender, 2004 p.4)
Pages	This field does not work with all output templates. We recommend you use the Suffix modification instead.

To customise a formatted citation by adding a prefix, suffix or page numbers, or to modify several citations:

1. Click on the citation to select it.
2. Click on **Edit & Manage Citation(s)** in the Word EndNote toolbar.
3. The **Edit & Manage Citations** dialog box will be displayed. All the citations within the document will be listed. Click the citation you want to customise.
4. Customise the citation as needed. If you wish to change one reference within a group, make sure you click on the correct reference from the list in the "Edit & Manage Citations" window first, to ensure you change the correct reference.
5. Click **OK**.

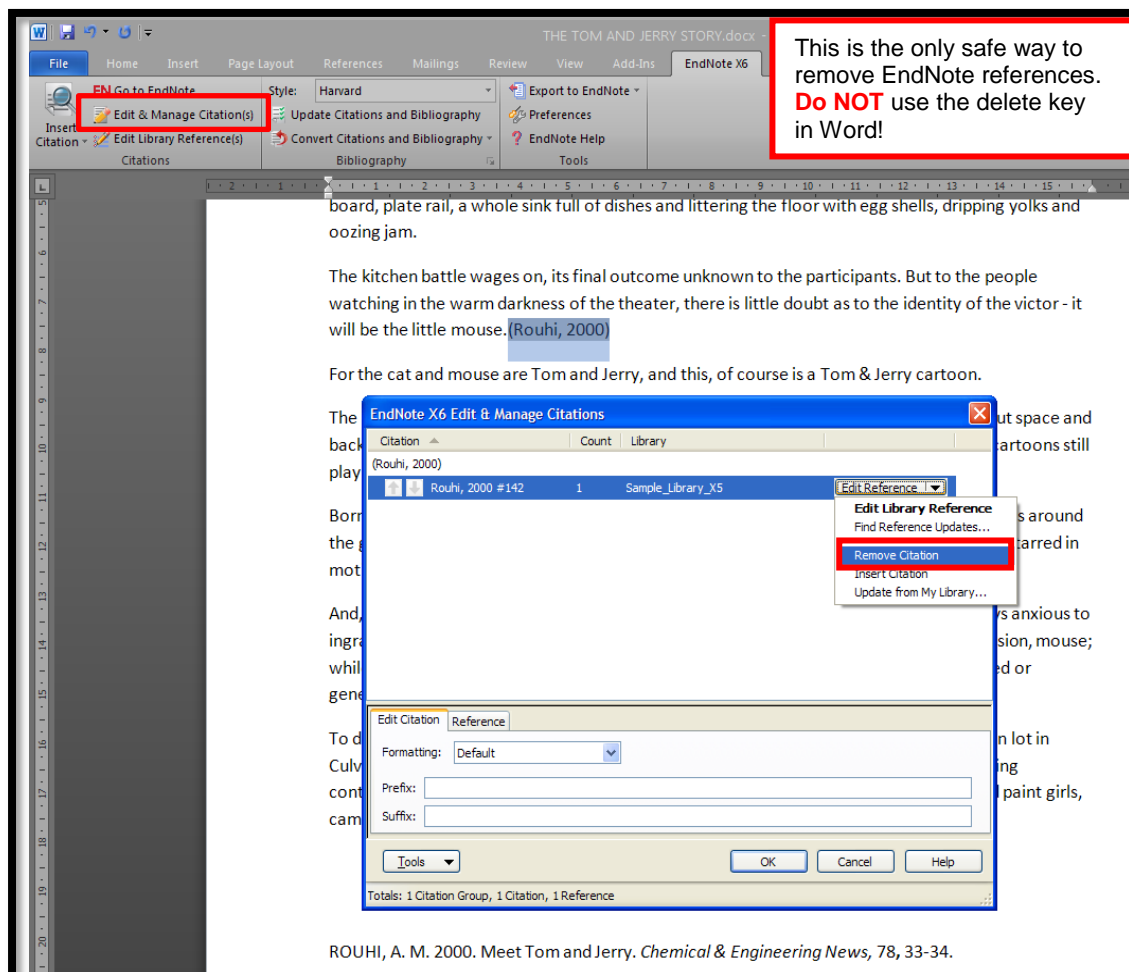
## Deleting Citations safely

(i.e. How not to corrupt your Word files with one easy keystroke!)

Please **do NOT** delete unwanted citations by highlighting them and hitting the delete key in Word. While doing so *does* remove the unwanted citation's text, it leaves all of the “behind the scenes” coding that allows EndNote X6 and Word to work together. This orphaned code can cause all sorts of problems later, including citations appearing out of order, and is hard to fix.

If you wish to remove a citation properly:

1. In your Word Document Click on the citation to select it.
2. Click on **Edit & Manage Citation(s)** in the Word EndNote toolbar.
3. The **Edit & Manage Citations** dialog box will be displayed. All the citations within the document will be listed. Click the **Edit Reference** dropdown arrow next to the citation you want to delete
4. Click **Remove Citation**.
5. Click **OK**.



## ***Cite While You Write: an exercise***

1. Open the EndNote library that contains the references you wish to cite. We will use our new library.
2. Open a new Microsoft Word 2010 document.
3. Type in the following code to generate some random sentences we can work with:

**=rand(2,6)**

4. Press *Enter*.
5. Click at the end of the first sentence.
6. **Add an in-text citation** to the end of the sentence.
7. **Edit the citation** and **hide the author's name** from the brackets.
8. Add a different citation at the end of another sentence.
9. Safely and correctly **remove the citation** – **don't hit the delete button!**
10. Add another citation within a sentence. **Highlight and drag the reference** to a different part of the document. (Moving citations within the same document will not corrupt the document.)
11. Edit the citation to **add a page number**.
12. Edit the citation to **hide the publication year**.
13. **Activate a new style** of your choice within Word

## Where can I get further help with EndNote?

- **TIP:** First make sure you have updated your EndNote X6 software with the latest patch as this may resolve your problem. Within EndNote, click **Help > EndNote Program Update**
- **Exeter University Library's Reference Software pages:** look here for further information on EndNote Web and also for access to our Researcher's guide (more advanced use of EndNote)  
<http://as.exeter.ac.uk/library/using/help/general/information skills/referencingsoftware/>
- **ELE : Library and Research skills → Referencing**  
<http://www.exeter.ac.uk/libraryexpert>
- **The EndNote website:**  
<http://www.EndNote.com>  
You can download thousands of output styles, import filters and templates from this website as well as view online tutorials.
- **EndNote discussion forum:**  
<http://forums.thomsonscientific.com/ts/?category.id=EndNote>
- **EndNote Official Support email:**  
[Support@adeptscience.co.uk](mailto:Support@adeptscience.co.uk)
- **EndNote Official FAQs:**  
<http://endnote.com/support/faqs>