Introduction to EndNote X7

Introduction

EndNote is one of several reference management programs. The main purpose of these programs are:

- Maintain a personal database of references, and co-locate these with their full text documents
- Import references from journal and reference databases
- Insert in-text references into Word documents
- Generate a bibliography in the correct referencing style.

Obtaining EndNote

Current staff and students of the University of Newcastle are able to obtain EndNote via the following methods, provided it is used for coursework, research, or other university-related activities:

- Download from the University's EndNote download site: www.newcastle.edu.au/current-students/campus-environment/information-technology/computers/software-for-home-use

  Use your University of Newcastle username and password for authentication. Note that the files are very large and may take some time to download via a broadband connection. You can download the files on campus to a USB drive or external hard drive.

- Borrow a copy of the software on CD from any University of Newcastle Library. Check the Library catalogue at www.newcastle.edu.au/library - search for "EndNote X7".

- Staff and RHD students requiring on-campus installation - contact 17000@newcastle.edu.au

Compatibility and System Requirements

See details at: endnote.com/product-details/compatibility

Upgrading from Earlier Versions of EndNote

Whether you upgrade or not depends on what software you use and whether your EndNote library will be used on several different computers.

Before upgrading:
- Back up your EndNote libraries and DATA folders.

- Uninstall earlier versions of EndNote – go to **Control Panel | Add or Remove Programs**, highlight EndNote, and click the **Change/Remove** button.

After Upgrading
- References in the EndNote X7 copy of the library will have the same record numbers as in the original library.

- Regularly check for EndNote software updates by selecting **Help | Check for Updates.**

Creating and Managing your EndNote Library

Once you have installed EndNote, the first thing you need to do is create an EndNote library to begin storing your references and documents. There is no limit to the number of references that can be stored in your EndNote library.

You can create multiple EndNote libraries, but **this is not advisable**. You will encounter considerable difficulties if you insert references from different EndNote libraries into your Word document. It is recommended that you **keep all your references in a single library.** Use the *Label* or *Keywords* fields to differentiate between different subject areas or use *Groups* to help organise your references.

To create an EndNote Library:

1. Click on the **Start** button (bottom left corner of your screen), and select **All Programs | EndNote | EndNote Program**.

2. Select **Create a new library**, then **OK.** If you are using EndNote on campus you may be prompted to open your EndNote library.

3. Name your library appropriately, then select the folder where you wish to locate your Library.
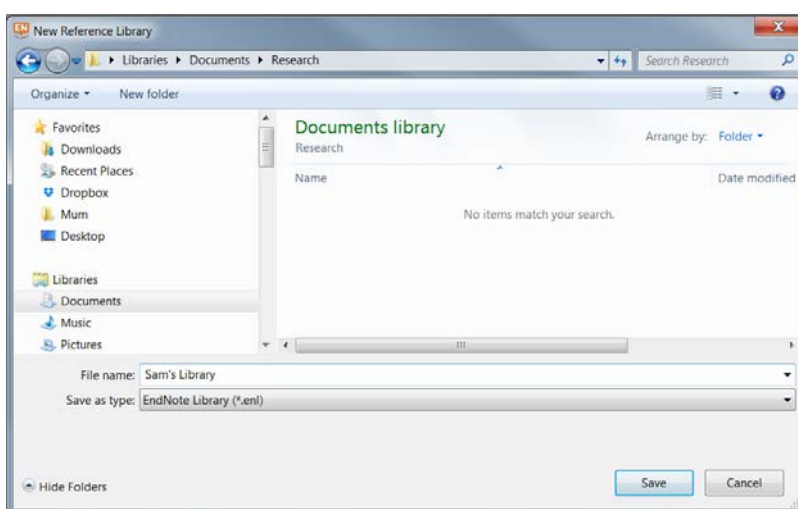
An EndNote library window will display. You are now ready to begin entering references into your library. As you do so, your library window will begin to look similar to the one illustrated on the next page.

The Library Window

The *EndNote Library Window* is divided into 3 main panels:

1. **Reference List Panel** – shows a brief display of your references

    Groups Panel – used to manage and access your groups and links to online resources. You can close the panel by clicking [Layout ▾] (bottom right of the *EndNote Window*) or via **Groups | Hide Groups,** .

2. **Tabs Panel** – includes 3 tabs:

    a. *Reference Tab* - allows quick editing of the selected reference

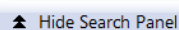   b. *Preview Tab* – shows how the selected reference will be formatted

    c. *PDF Tab* – allows viewing and annotation of PDFs. Click [↗] to open the PDF in a separate window.

    The *Tabs Panel* can be repositioned to the bottom of the screen – click [Layout ▾] .

A 4ᵗʰ panel is also available:

3. **Search Panel** - allows you to search your EndNote library for specific references. Close the panel by clicking [▲ Hide Search Panel] .
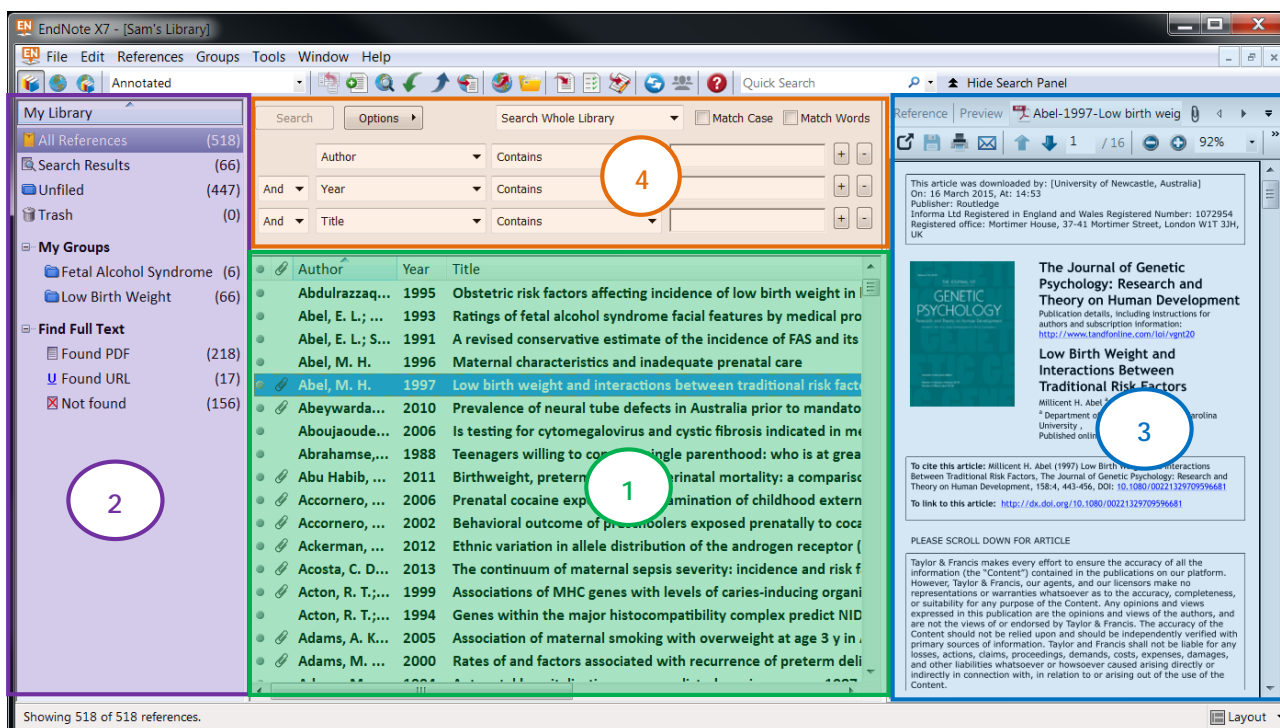
Your Library's Data Folder

When you create an EndNote library, a Data folder associated with your library is also created and saved in the same location as your EndNote library.

For example, if you create an EndNote library called *Sam's Library*, a folder called *Sam's Library.Data* will also be created. This happens automatically.

Documents and images you attach to any of your EndNote references are stored in this Data folder.
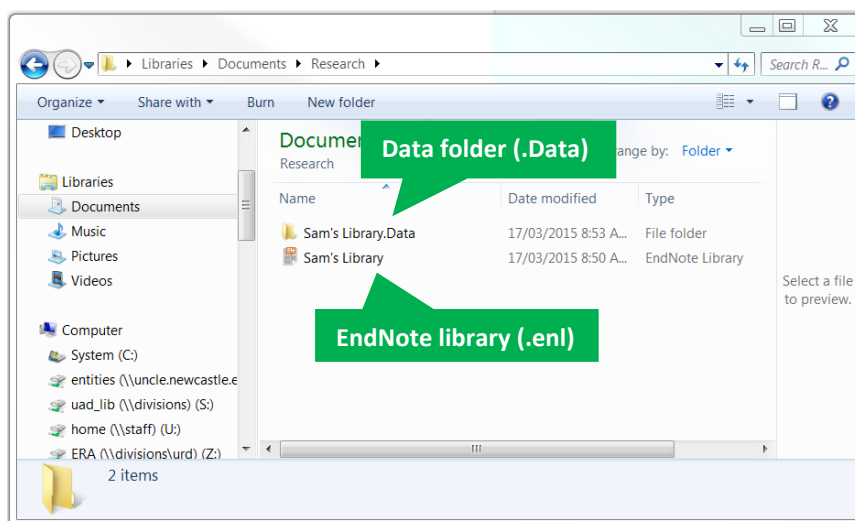
The Data folder is a critical part of your library. Whenever you copy or move a library, include not only the library (.enl file), but also its associated Data folder (.Data file) and all of its contents. See also **Backing Up Your Library and Documents** on **p. 15**.

Adding References to Your EndNote Library

You can add references to your EndNote library using the following methods:

- Manual entry, **p.5**
- Direct export from databases, **p8**
- Using connection files, **p.8**.
- Using import filters, **p.10**.

Manually Entering References

1. Select **References | New Reference** from the *EndNote toolbar* (or click on the *New Reference* icon). This will open a *New Reference* W*indow*.

2. By default the *New Reference Window* is set for the entry of journal articles. Select other reference types by clicking on the drop-down arrow to the left of **Journal Article**.

3. Enter citation details into the fields provided, Paying attention to the *Guidelines for Entering References* included below.
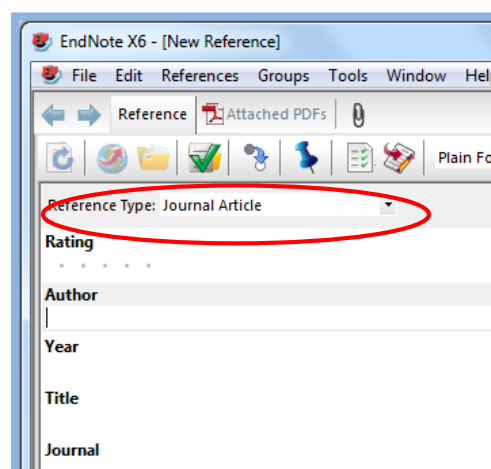
To move between fields, click within the field, or use the **<Tab>** key to move through the fields, and the **<Tab>** and **<Shift>** keys together to move upwards.

Guidelines for Entering References

Authors and Editors

- If there is more than one author, **each author must be entered on a separate line.**
- Enter full names wherever possible. If you don't have the full names, use initials separated with a full stop *or* space:

  e.g. Anderson, J M

  Anderson, J.M
- Enter author names in the following format:
- **<*Family name*><comma><space><*First name*><space><*Middle name*>**

  e.g. Bloggs, Joe David

  Van Tets, Gerald Frederick

  de Gaulle, Charles
- Enter authors with titles in the following format:
- **<*Family name*><comma><space><*First name*><comma><space><*Title*>**

  e.g. Smith, Alfred, Jnr
- If the author is an organization (i.e. a corporate author) **type a comma after the name**:

  e.g. *University of Newcastle,*
- If there is no author, leave the author field blank.
- Do not use **'et. al'**. Enter all known authors for a work.

Year

- Enter the year of publication as a four digit numeral, e.g. 2013.
- EndNote will automatically add "a" or "b", etc. to the year if multiple references by the same author in the same year are included in the bibliography.
- If year of publication is unknown, enter "in press", "in preparation", or similar.

Title / Journal

- If the title extends beyond one line, do not press enter at the end of a line - let the title wrap around to the next line.
- Do not underline or italicize titles - the EndNote output style used will take care of formatting issues.
- Do not enter a full stop at the end of the title.
- It is best to enter the title capitalized as it will appear in the bibliography, though the output style can modify this.
- Use the *Short Title* field to enter abbreviated versions of the regular title for in-text or footnote entries (if an EndNote style is configured to use the *Short Title* field and that field is empty, the normal *Title* field will be used instead).

- Enter the full journal title in the *Journal* field. If you use abbreviated journal titles in your reference lists, you can set up a Journal Term list to store the abbreviations.

Edition

- Enter the exact information you would like to see in a bibliography, for example, '1st', '2nd', etc., but do not enter 'ed', or 'edn'.

Volume and Issue Numbers

- Do not include 'vol' or 'no' with the actual volume or issue number.

Pages

- Do not use commas within page numbers. For example, 1,098 should read 1098.
- Page ranges may be entered as complete (1442-1449) or abbreviated (1442-9) ranges. The style used to create the bibliography will format in the correct way.

Label

- Can be used to store labels identifying aspects of your research.

Keywords

- Use to store keywords or subject headings that describe the content of the reference.
- Multiple keywords may be separated by semicolons (**;**), backslashes (****), or the **<Return>** key.

Abstract

- The *Abstract* field can hold the equivalent of up to 16 pages of text.
- Use for a brief of the contents of the work.
- Annotated bibliographies use the text contained in the *Abstract* field as the annotation.

Notes

- When importing records from databases many EndNote filters will dump unsorted information into the *Notes* – this can be manually removed if desired.

Research Notes

- If you regularly import large numbers of records from databases, use the *Research Notes* field to include any personalised notes.

DOI

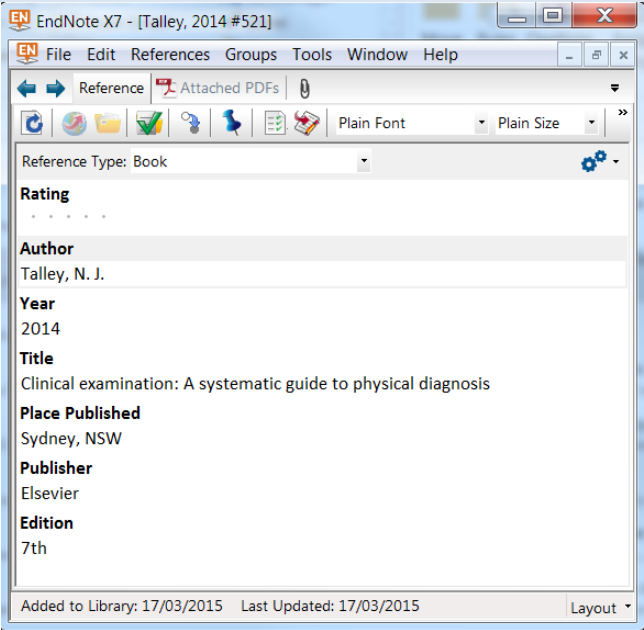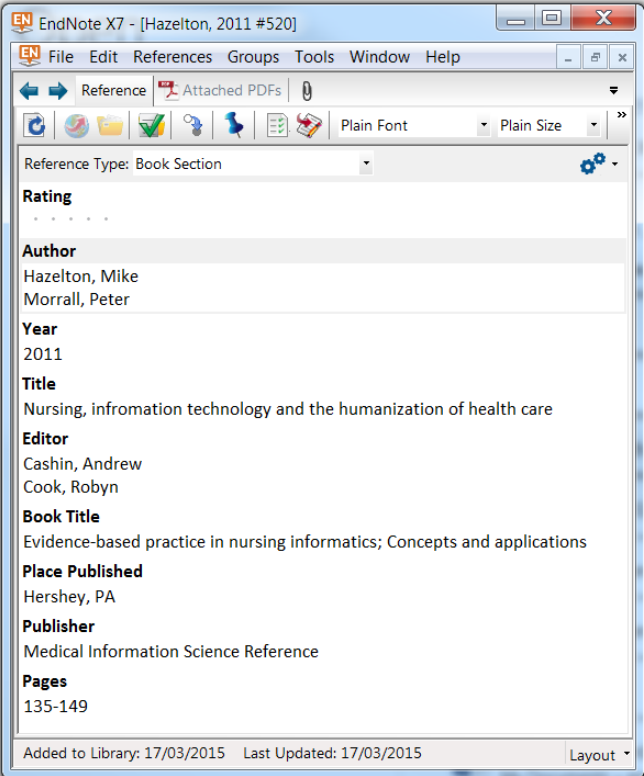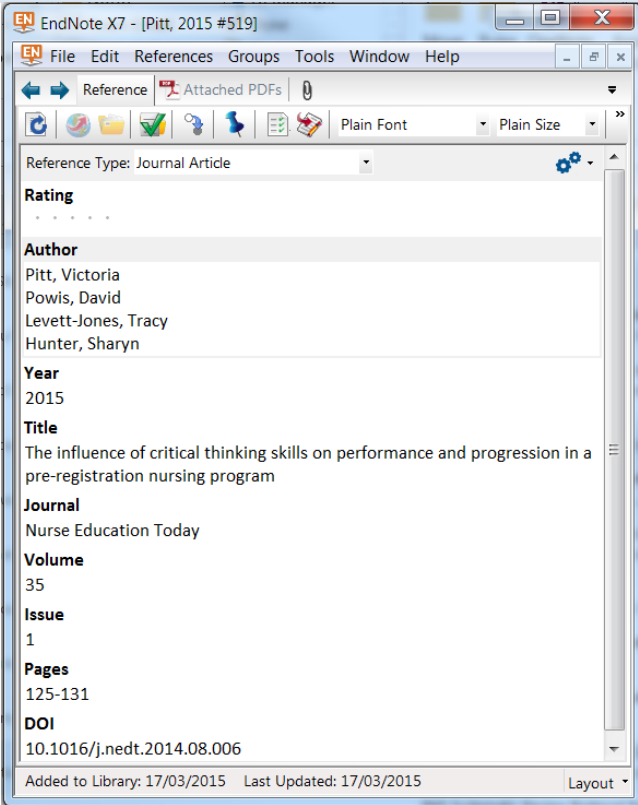- Enter the DOI into this field. Most online journal articles have DOIs
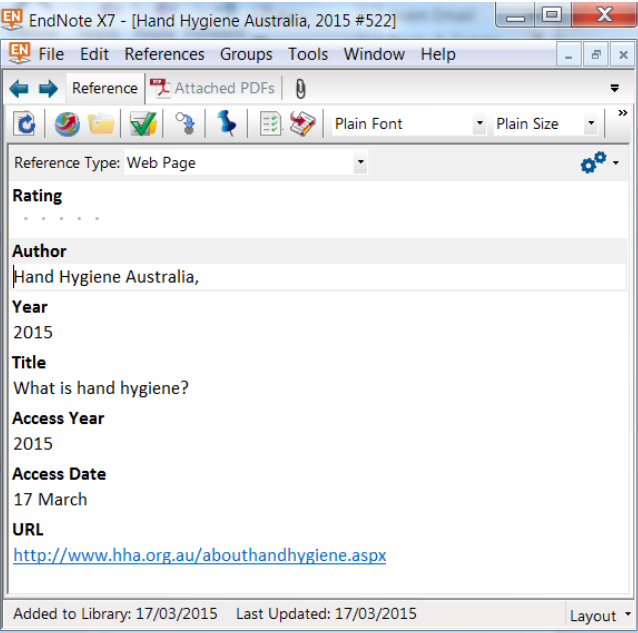
URL

- Use to store the URL of a relevant web site. Multiple URLs should be entered one per line within this field. Any text appearing in addition to the URL will most likely prevent the URL from launching.

The minimum fields to be completed are those required for a complete reference list entry (all others are optional).

The table below identifies common elements of key publication types, along with an example EndNote record.

Publication	Required Elements for a Citation	Example EndNote Record
Book	• Author/s • Year of Publication • Title • Place of Publication • Publisher • Edition (if provided) • If the book is online – the DOI or URL	
Book chapter	• Author of Chapter • Year of Publication • Title of Chapter • Editor of Book • Title of Book • Place of Publication • Publisher • Pages • Edition (if provided) • If the chapter is online – the DOI or URL	

Publication	Required Elements for a Citation	Example EndNote Record
Journal Article	• Author/s • Year of Publication • Title • Journal Title • Volume • Issue • Page Numbers • If the journal article is online – the DOI or URL	EndNote X7 - [Pitt, 2015 #519] File Edit References Groups Tools Window Help Reference Attached PDFs Reference Type: Journal Article **Rating** **Author** Pitt, Victoria Powis, David Levett-Jones, Tracy Hunter, Sharyn **Year** 2015 **Title** The influence of critical thinking skills on performance and progression in a pre-registration nursing program **Journal** Nurse Education Today **Volume** 35 **Issue** 1 **Pages** 125-131 **DOI** 10.1016/j.nedt.2014.08.006 Added to Library: 17/03/2015 Last Updated: 17/03/2015 Layout
Webpage	• Author/s • Year of Publication (look for the copyright date usually included at the foot of the page • Title of page • Date the webpage was accessed • URL	EndNote X7 - [Hand Hygiene Australia, 2015 #522] File Edit References Groups Tools Window Help Reference Attached PDFs Reference Type: Web Page **Rating** **Author** Hand Hygiene Australia, **Year** 2015 **Title** What is hand hygiene? **Access Year** 2015 **Access Date** 17 March **URL** http://www.hha.org.au/abouthandhygiene.aspx Added to Library: 17/03/2015 Last Updated: 17/03/2015 Layout

Click the cross in the top right corner of the *Reference Window* to close and save the reference.

Direct Export from Databases to EndNote

Most of the library's databases include a 'direct export' option that allows you to export references from the database to your EndNote Library. This is called 'direct export'.

Using direct export is straightforward, and generally involves the following 3 steps:

1. Searching the database

2. Marking the records that you want to save

3. Selecting the database's direct export option

If an EndNote Library is open, references are automatically imported into it. Otherwise, nominate the EndNote Library where the references will be transferred.

Check the University Library's *EndNote LibGuide* for exact instructions on using direct export for specific databases at: libguides.newcastle.edu.au/endnote - click the **Collecting References | Exporting directly from databases Tab**.
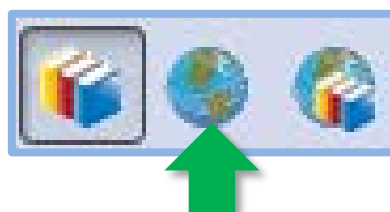
Using Connection Files

Connection files allow you to connect to library catalogues or databases, to search these and download the references, all from within your EndNote library.

Some of the connection files you might find useful are: PubMed, University of Newcastle Library catalogue, CSIRO Library, and other Australian University Library catalogues.
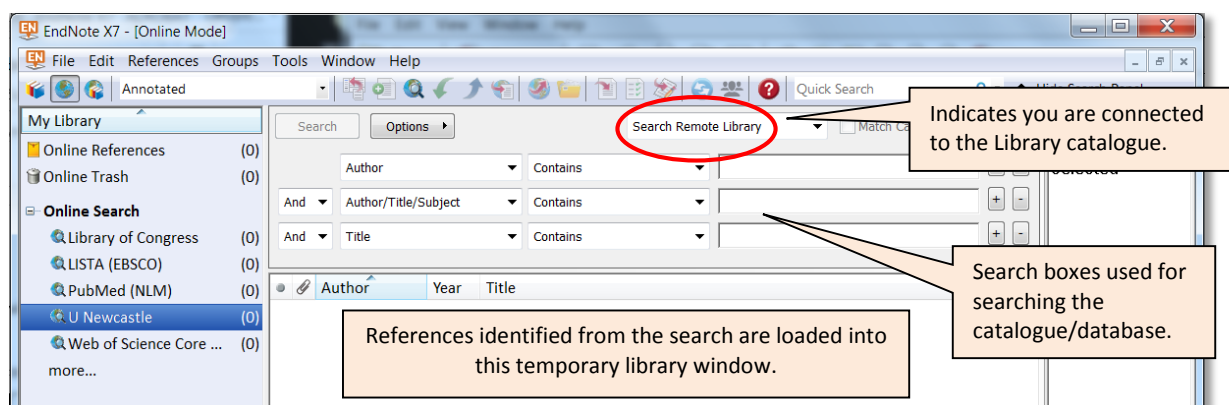
> **Although EndNote comes pre-installed with hundreds of connection files, the only accessible connections will be for library catalogues and PubMed.**

To use the connection files:

1. Select the **Online Search Mode** icon, located at the top left of the EndNote window (image at right).

2. The *Online Search Group* will now open in the left panel of your *EndNote Window*.
3. Click on the connection required in the list, or select **more …** to view the complete list of the EndNote connection files.

Indicates you are connected to the Library catalogue.

Search boxes used for searching the catalogue/database.

References identified from the search are loaded into this temporary library window.

4. Enter your search terms, then click **Search**. A dialogue box (at right) will display the number of results identified from the search.

5. If too many references are identified, click **Cancel** to return to the *Search Window*, and refine your search . Otherwise, click **OK**. The results will be downloaded into your temporary library. If you need to, you can double-click on a reference to open it and view the full details.

6. Highlight the references you would like to keep (to select multiple references, hold down the **<Ctrl>** key while selecting), then:

   - **Right** click **| Copy References To** then click on the name of your library; OR
   - Click the **Copy to Local Library** button ([□]) on the EndNote library toolbar.

    The references will be transferred to your library.

7. When you have finished searching click the **Local Library Mode** button [📕] to return to your EndNote library.

8. When you close your EndNote library you will be asked if you wish to discard all online references. This will not discard the references you have moved into your EndNote library.
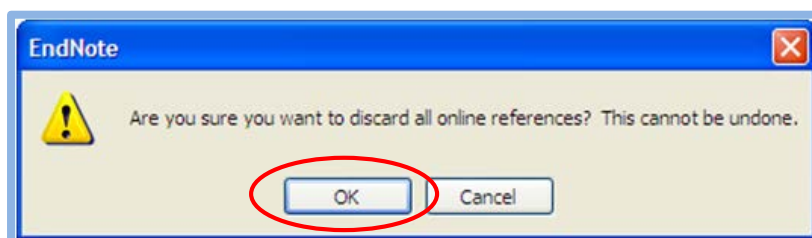
Important! Ensure that the reference information has been imported correctly according to the *EndNote Guidelines* (**page 6**) edit as necessary. The **Copied References Group** includes the references imported via the connection file.

Importing Downloaded References with a Filter

Some databases do not provide a direct export option – for these you may be able to import references into EndNote using an import filter.

Many filters are supplied with the EndNote software but the filters listed on the University's EndNote LibGuide are not. Download these filters at:

   libguides.newcastle.edu.au/endnote – click the **Collecting References | Import Filter tab**.

Downloaded filters must be saved to the EndNote filters folder [C:/Program Files (x86)/EndNote X7/Filters].

A Word of Caution about Importing

Although importing references can save you a lot of time, it is important to understand that importing is not possible from all databases, and even when it is possible, it is not always one hundred percent accurate. This means that it is essential to carefully check the references you have imported, and correct any mistakes or inaccuracies.

Mistakes in the references in your library will translate into mistakes in your bibliographies.

Minimising Mistakes Caused by Incorrectly Imported References

Whether you use direct export, an import filter, or a connection file, it is essential to check and correct your imported references after importing and before you insert them into your documents.
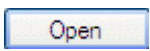
You can do this either by:

a) Checking each reference as soon as they are imported into your Library. Make any corrections and they will be automatically saved when you select another reference.

b) Saving your imported references into a new *Group*. You can then check each reference separately and correct any mistakes using the same steps as in Part (a) above.

Storing Documents and Images with Your Library

EndNote allows you to add files to records in your library. Added files are stored in the library's Data folder. You are able to attach any of the common file types to references in your Library, including audio & multimedia files (wav, mp3, mov, Quicktime), PDF, Microsoft Access/Excel/PowerPoint/Project/Visio/Word files, and text files (txt, rtf, html).

Importing from a database, does not automatically bring the full text of the article. Instead you will need to download the full text and attach it to your EndNote reference using the following steps.

Attaching PDFs

- Right click on a reference in the *Library Window*, then select **References | File Attachments | Attach File**

- Select a file, then [Open]. The file will be copied to the **DATA\PDF** folder, and an icon will appear in the *Paperclip* field within the *Reference Window*.

You can also attach files by dragging and dropping a file onto a reference in either the *Library Window* or the *Reference Window.*

Up to 45 files may be attached to each record.

Using the Find Full Text Command

EndNote can automate the process of locating and attaching full text files to EndNote records using the *Find Full Text* command.

You must configure EndNote before first using *Find Full Text*:

- Open Endnote, then click **Edit | Preferences** (🍎 click **EndNote | Preferences**)

- The *EndNote Preferences Window* will appear (see below). Select **Find Full Text** from the left hand panel.

Ensure that each of the check boxes are ticked in this window and enter the following addresses in the corresponding fields:
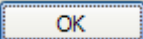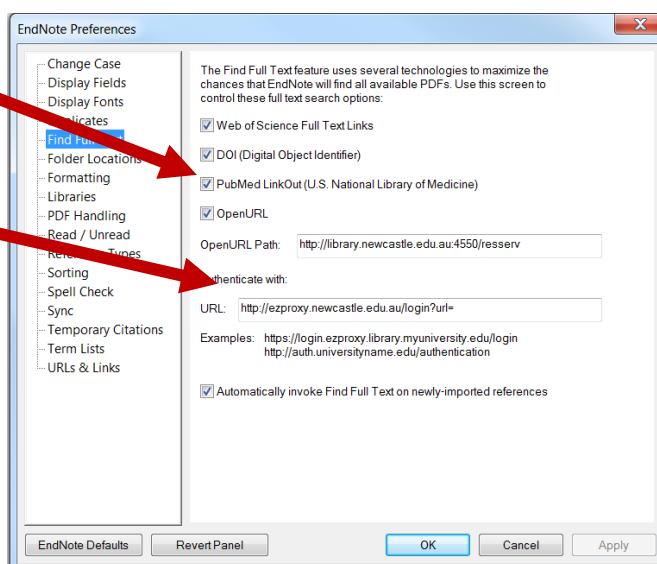
OpenURL Path:
http://library.newcastle.edu.au:4550/resserv

Authenticate with URL:
http://ezproxy.newcastle.edu.au/login?url=
(include the "=" in the last URL)

The *EndNote Preferences Window* will now appear, as in the example at right.

Click **OK** (follow the steps above, click **Save**, then close the *EndNote Preferences Window*).

Using Find Full Text:

▪ Highlight the reference(s) to be checked (you can select up to 200 at a time), then check **the Find Full Text icon** ( ). EndNote will search for the PDF files and attach to the appropriate reference. This may take a few minutes depending upon the number of files to be attached.

Find Full Text will only work for University of Newcastle subscribed full text resources, as well as some open access resources.
There may be times when *Find Full Text* will be unsuccessful due to proxy, firewall, or subscription issues. In these cases, search the Library catalogue using the journal title.

Identifying Duplicate Records
EndNote identifies a reference as a duplicate if they have the same reference type (such as Journal Article), and the *Author*, *Year* and *Title* are identical.

To identify and delete duplicated records:

- Select **References | Find Duplicates.** EndNote will display a *Find Duplicates* dialogue box, differences between records will be highlighted in blue.

- For each set of duplicates the older (first entered) reference will always appear in the left column.

Before selecting *Keep This Record* (which will delete the duplicate), check the record numbers to ensure you are not deleting a reference already cited in a paper.

It is important to follow up this automatic checking process with a manual check for duplicates.

Searching and Sorting Your EndNote Library
As your library grows in size, using the sort and search tools will make it quicker and easier to locate the references you want to use.

To sort your references click on any of the column headings. For example, clicking on the **Title** column heading, the references will be sorted A-Z. Click on the **Title** column heading again, they will be sorted Z-A.

To search your library, either use the **Quick Search** box or click **Show Search Panel** for a more thorough search.

Search results will be shown in a temporary group with your other references temporarily hidden.

Quick Search Tool: Type a keyword, phrase or author name and hit **<enter>** to search.

The search results are displayed here. To see all references click on **All References** at the top of the *Groups Pane*.
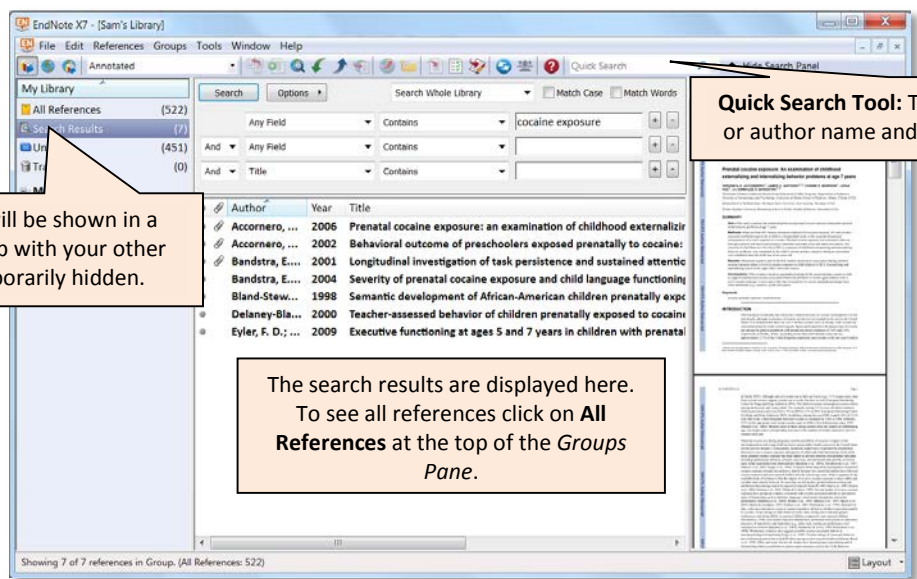
Grouping References

EndNote provides the ability to group references to help organise your library. It is possible to create up to 500 custom group sets in your EndNote library. A new library begins with a single custom group set called **My Groups**.

To create a new group:

- Right click on **My Groups** in the *Groups Panel*, then select **Create Group.** Type the name of the group, then **<Enter>**.

- Add references to groups by highlighting the reference/s in the *Library Window* then dragging to the group. Groups are listed alphabetically (click the *Groups* header to toggle between ascending and descending order).

Group Sets may contain any combination of groups. **To create a Group Set:**

- Right click on **My Groups,** then select **Create Group Set.** Type the name of the group set, then **<Enter>**.

- You can add individual groups to the group set, either by creating a new group (following the directions above), or moving an existing group to the new group set (click on the group name then drag and drop to the group set).

Smart Groups use search criteria to dynamically update groups as existing references are edited or new references are added to the library. Once a smart group is created it works in the background, automatically adding new references that match the smart group's criteria.

To create a Smart Group:

- Right click on **My Groups** in the *Groups Panel*, then select **Create Smart Group.** The *Smart Group Window* (see right) will appear.

- Name the group in the *Smart Group Name* box.

- Enter the terms you want to identify for inclusion in your smart group, and select the field/s within which EndNote will search for the terms
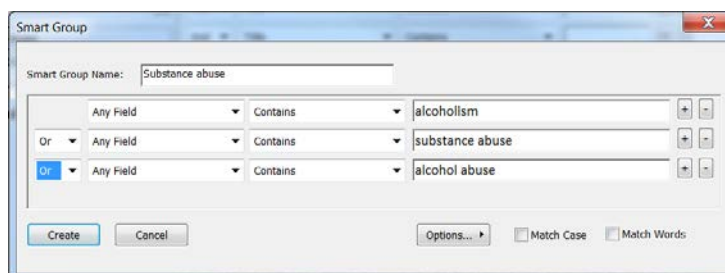
Choose the appropriate Boolean Operator (AND, OR, NOT), then click [Create]. To hide the *Groups Panel* click on **Groups | Hide Groups.**

Global Editing of Records

EndNote provides a feature that allows you to add text to a number of references simultaneously. This feature is particularly useful when you are transferring references from databases into EndNote and need to add text to your references, such as keywords or details about the name of the database.

To add text to multiple references:

Select **Tools | Change/Move/Copy Fields.** The *Change/Move/Copy Fields Window* will appear (see at right).

1. Ensure the *Change Fields Tab* is selected:
2. From the *Select a Field drop down list*, select the field to which the text will be added (eg. *Name of Database field*)
3. Type the text to be added into the text box (eg. *Medline – search March 17th 2015*)
4. Select where you would like the text to be added within the field using the *Change* radio button
5. Click [OK].
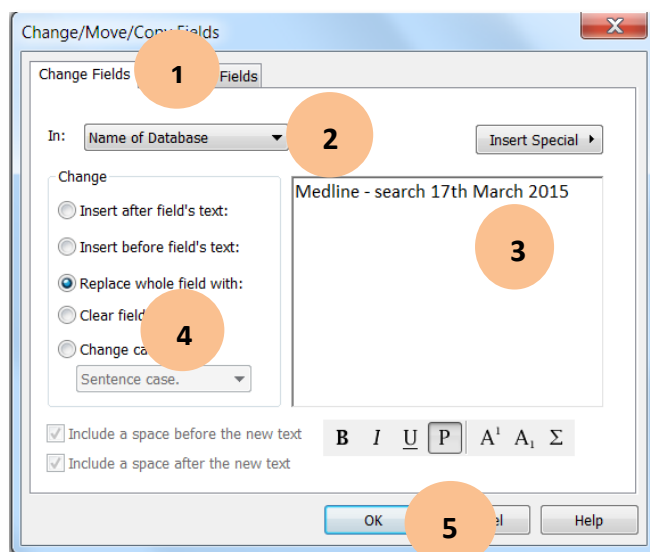
Backing Up Your Library and Documents

It is essential to make a back-up of your EndNote library (and associated Data folder) in case disaster strikes. There are several ways in which you can do this:

- Using **Windows Explorer** or **My Computer** to navigate to where your files are stored. Highlight and **Copy** your EndNote library (.enl file), AND it's associated Data (.Data) folder, then **Paste** it to a different folder on your computer, and/or to a USB drive or other portable storage device.

- Open your EndNote library, select **File | Compressed Library (.enlx)**, and choose the option to **Create | With File Attachments.** This creates a single compressed file. Save this to a different folder on your computer, and/or to a USB drive or other portable storage device**.**

- Use the **File | Compressed Library (.enlx) | Create & Email** command to send a copy of your EndNote library via email to yourself or a colleague.

- Use the **File | Save a Copy…** command to save an exact copy of the library to a different folder on your computer, and/or to a USB drive or other portable storage device. This will save a copy of your library, plus its associated Data folder.

Whenever you make changes to your library, you should always update all back-up copies. It is also advisable to save back-up copies of any Word documents you are using in conjunction with your EndNote library.

When using EndNote on campus, students can also save their EndNote library and associated Data folder to their student folder on the U Drive.

Syncing Your Library

To work with your library from more than one computer (e.g. between home and your campus office) you can also use **EndNote Online** to synchronise the library between the computers.

EndNote allows you to synchronize the references (including file and figure attachments) in your EndNote desktop library with the references in your EndNote online library.

The Sync process:

- Automatically synchronizes both sets of references that reside in groups so that an exact match exists in both EndNote desktop and EndNote online.
- Includes all data changes to references (including file attachments) during the Sync process so that each library matches the other. For example, if you add or remove references and/or PDF files in EndNote, then those changes are updated in EndNote online and vice-versa.
- Includes updates and additions to groups in both libraries. For example, if you create and add references to a new group in EndNote, then you will see this group in EndNote online the next time you run the Sync process.

The Sync process is always initiated from within EndNote.

To sync your EndNote Library with EndNote Online:

- Click the *Sync Library icon*

- Complete and submit the registration form. The sync system will authorise your account and your details will be added to EndNote (in **Edit | Preferences | Sync**).
- The Library will automatically sync with your EndNote Online Library every 15 minutes, plus when you close the Library. The first time the Library is synced may take a long time, especially if many references have full text attachments. A 5GB limit is available for your online EndNote Library.

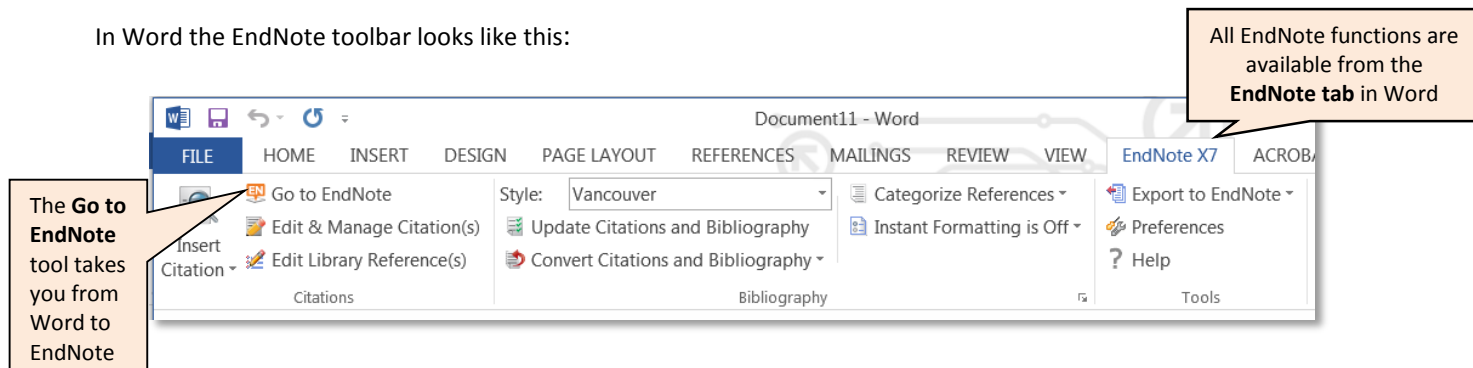**To share your EndNote Library, click the *Share Library icon*:**

Important Points about Syncing
- Sync works with only one library and one EndNote Web account.
- You can always cancel a Sync process that is currently in progress. However, EndNote processes all information that has gone through the Sync process up to the cancellation point. If there are conflicts between references in EndNote and EndNote Web, then a Sync Conflicts folder appears in the Groups panel listing all record conflicts.
- You can cancel the automatic sync via **Edit | Preferences | Sync** – un-check **Sync Automatically**.
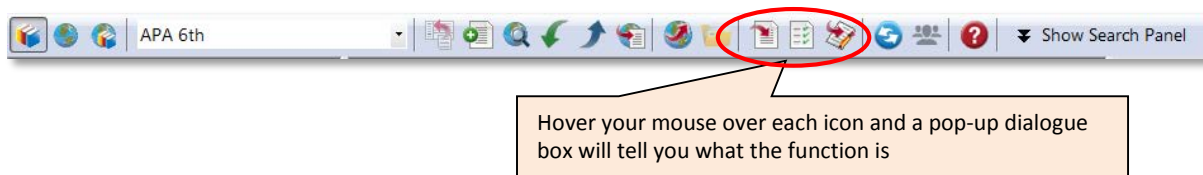
Using EndNote with Word to Create In-Text Citations and Reference Lists

This is when the effort you put into creating your library starts to pay off. Open both Microsoft Word and your EndNote library.

In Word the EndNote toolbar looks like this:

> All EndNote functions are available from the **EndNote tab** in Word

> The **Go to EndNote** tool takes you from Word to EndNote

In EndNote the tools used to insert citations into Word looks like this:

> Hover your mouse over each icon and a pop-up dialogue box will tell you what the function is

If you have installed EndNote, but you don't have the CWYW toolbar in Word, please see
endnote.com/support/faqs/endnote

Selecting Output Styles

An output style determines how the information in each of your EndNote references will appear in your in-text citations, footnotes, or bibliographies.

Over 500 of the most popular styles are pre-loaded in EndNote with an additional 5,000+ styles freely available for download at endnote.com/downloads/styles

By default EndNote shows **Author-Date**, **Annotated**, **Numbered** and **Show All** on the *Output Styles* menu.

To Add Your Preferred Styles in Word

- Click the drop down arrow to the right of the currently selected style
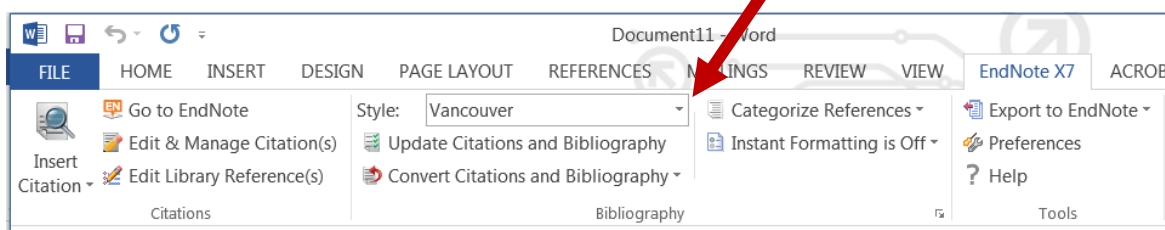
- Click **Select Another Style ...** The *EndNote Styles Window* lists all available reference styles. Styles may be re-sorted by clicking on the **Name** or **Category** column headings.

- Select a style by clicking on the style name, then click [OK].

To Add Your Preferred Styles in EndNote

1. Click on **Select Another Style…** from the *Style drop down menu*.

2. Highlight the required style in the *Choose a Style Window*, and click **Choose**.
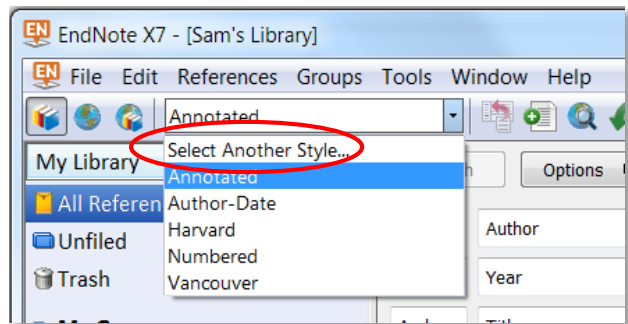
3. Your style should now be showing in the *Output Style Menu*. Highlight a reference and click on the **Preview tab** to see how the reference will look with this style.
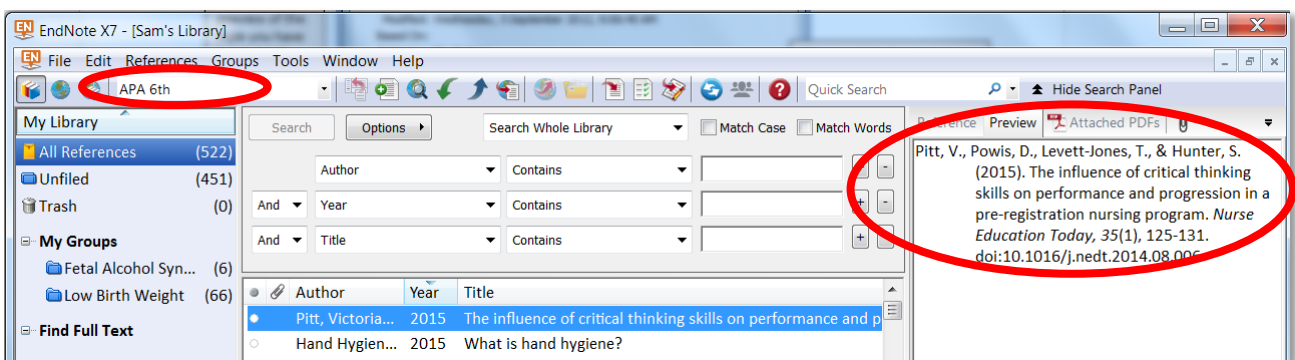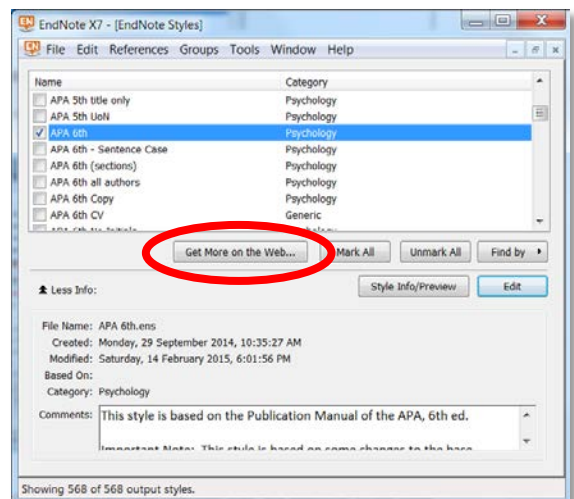
Finding and Downloading Additional Output Styles

1. If you require an output style which is not in the above list, click on **Edit | Output Styles | Open Style Manager | Get More on the Web…**

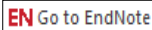You will be taken to the EndNote *Output Style Download* page.

Additional output styles should be saved to:
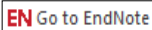   **C:\Program Files (x86)\EndNote X7\Styles**

Creating In-Text Citations

There are a number of ways in which you can insert references from an EndNote library into a Word document - there is no one 'right' way. Similarly you can have the correct output style selected in EndNote when you start writing your paper, or if it is not selected, easily change it at any point.

Using the 'Go to EndNote' command

1. In Word type some text and position your cursor where you wish to insert a citation.

2. Still in Word, click on the *EndNote X7 tab*, select **EN Go to EndNote**

3. Select the reference you wish to insert, then click **Insert Citation** from the *EndNote toolbar*. You will be returned to Word, where a citation for the selected reference will have been inserted into the text of your document, and the full reference will also have been added to the list of references at the end of your document.

Inserting multiple references

1. Type some more text and position your cursor where you wish to insert the citations.

2. In Word click on the *EndNote X7 tab*, select **EN Go to EndNote**. Hold the Ctrl key down and click on the multiple references that you wish to insert, then click **Insert Citation**. The multiple references should now be inserted into Word.

### Using the 'Find Citation' command

1. In Word type some more text and position your cursor where you wish to insert a citation.

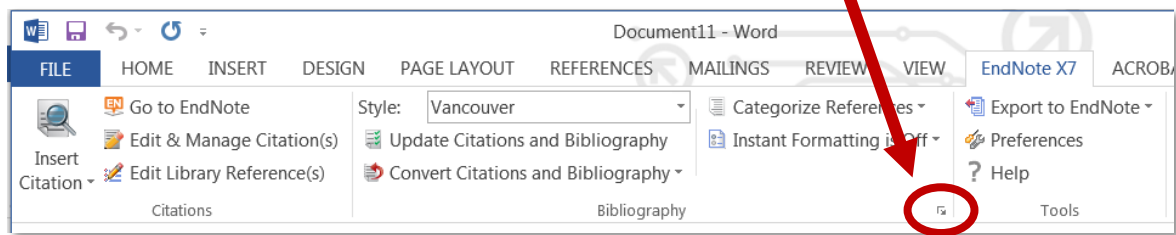2. Still in Word, click on the *EndNote X7 tab*, click . This opens the *EndNote X7 Find & Insert My References window* (see at right).

3. Enter your search term in the **Search** box, then click **Find**. References containing your search term will be displayed.

4. Select the required reference (multiples can be selected by holding down the **<Ctrl>** key on your keyboard while selecting), then click .
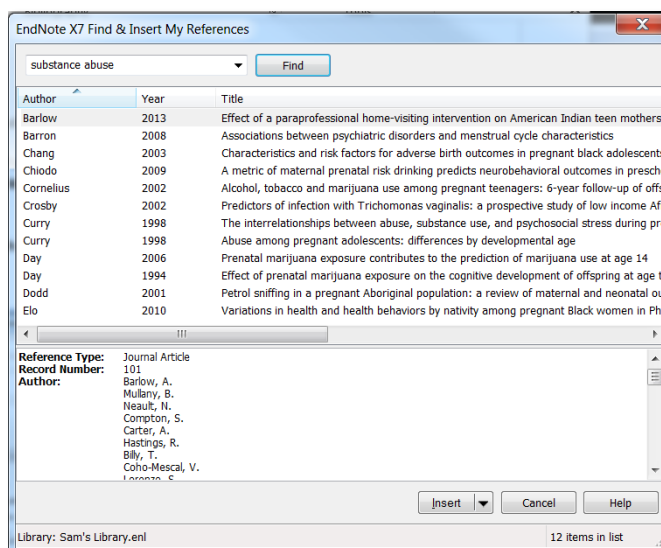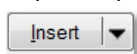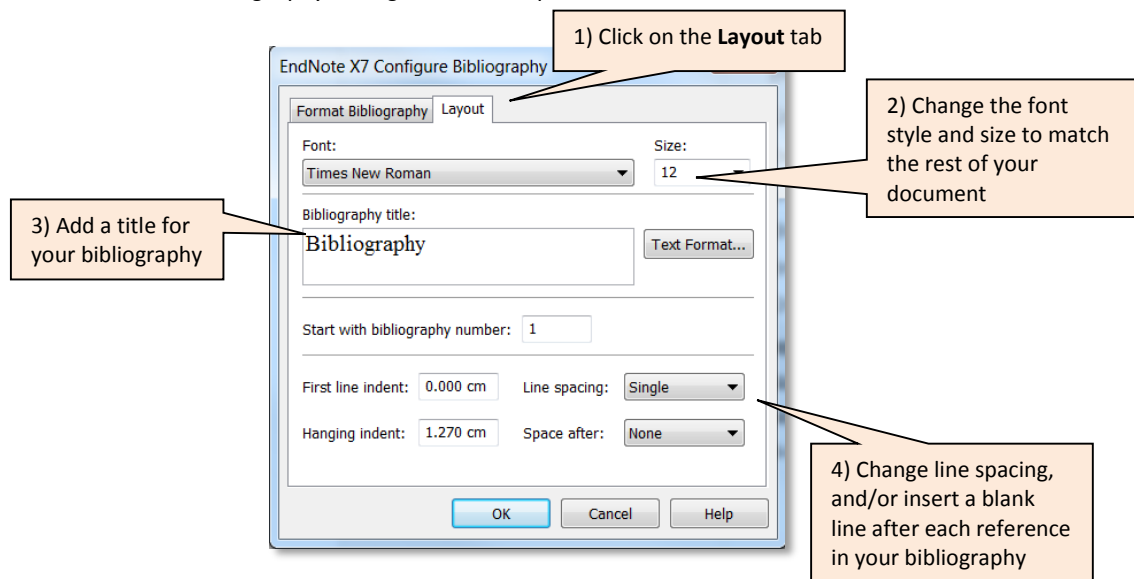
Reformatting the Style or Layout of your Citations and Bibliography

1. In Word select the *EndNote X7 tab* and click on the arrow to the right of **Bibliography**.

The *EndNote X7 Format Bibliography dialogue box* will open.

1) Click on the **Layout** tab

2) Change the font style and size to match the rest of your document

3) Add a title for your bibliography

4) Change line spacing, and/or insert a blank line after each reference in your bibliography

Using Footnote Styles with EndNote

If the style you are required to use is a footnote style, such as Chicago or AGLC3, you must first create a footnote in your document, before inserting a reference using one of the methods described above. EndNote will then format the in-text citation in the footnote and add the reference details to the bibliography.

1. In Word, place the cursor against the statement you are referencing. To create a footnote, select **References | Insert Footnote**.
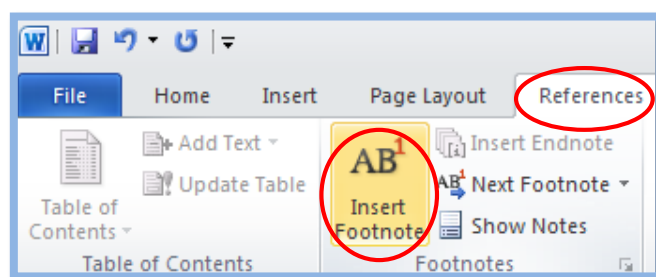
2. A footnote number will be placed where your cursor was positioned. Your cursor will now appear in a footnote at the bottom of the page.

3. Insert the required reference(s) from your EndNote library using either of the **Go to EndNote** or **Find Citation** command.

Editing Citations in Your Document

Editing of citations should ONLY be done using the **Edit & Manage Citation(s)** command on the *EndNote X7* tab in Word.
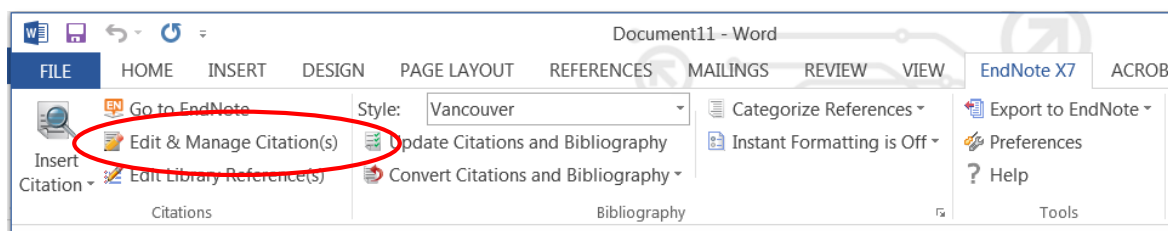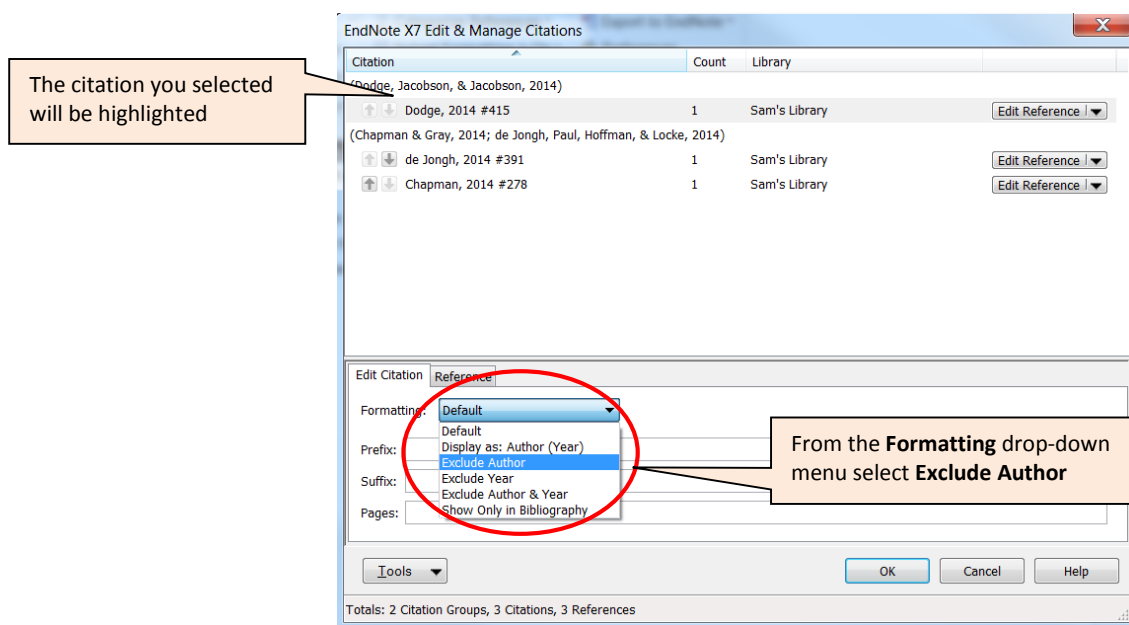

There are various ways that you may need to edit your in-text citations, for example:

- Excluding the author's name as you have already used it in a sentence, e.g. *As Evans (1986) stated...*

- Excluding the year as you have already referred to it in a sentence, e.g. *As reported in 1997, Jane Austen was not ... (Teachman).*

- Where page numbers are required as you have used a direct quote, e.g. *"Jane Austen's own description of her subject matter" (Evans, 1986, p. 313)....*

Excluding the Author Name

1. Click on the reference within your document (it will appear in grey), click on the *EndNote X7 tab*, then select the **Edit & Manage Citation(s)** command. The **EndNote X7 Edit & Manage Citations** dialogue box will open.

The citation you selected will be highlighted

From the **Formatting** drop-down menu select **Exclude Author**

2. From the **Formatting** drop-down menu select **Exclude Author**, then **OK.** The author should have been removed from the citation so that only the year is in the brackets.

Excluding the Year
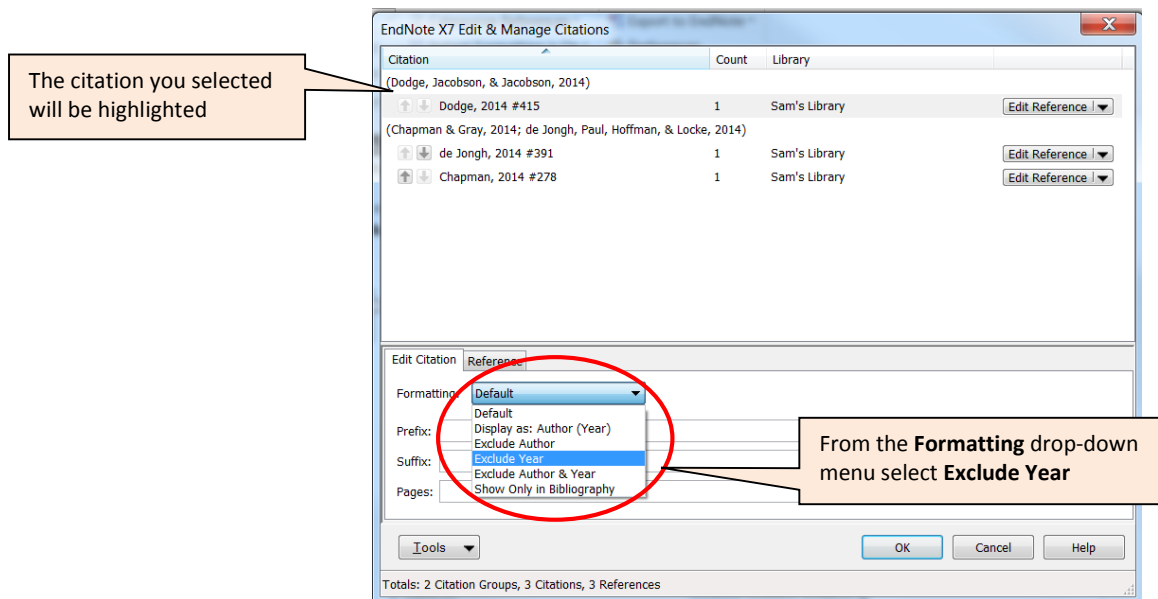
1. Click on the reference in your document (it will go grey), click on the *EndNote X7 tab*, then select the **Edit & Manage Citation(s)** command. The *EndNote X7 Edit & Manage Citations dialogue box* will open.

The citation you selected will be highlighted

From the **Formatting** drop-down menu select **Exclude Year**

2. From the *Formatting drop-down menu* select **Exclude Year**, then **OK.** The year should have been removed from the citation.
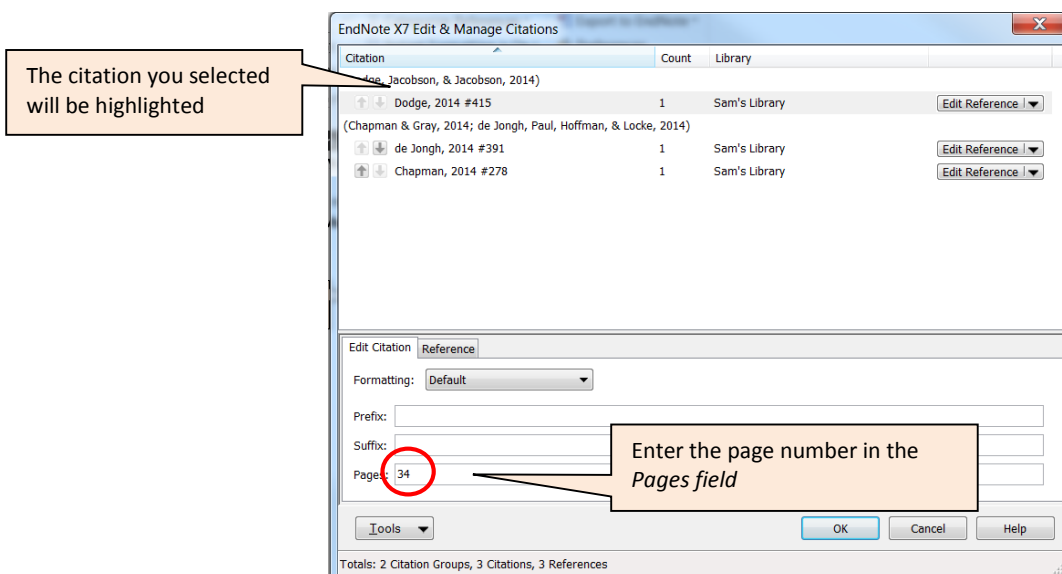
Adding Page Numbers after a Citation

1. Click on the reference in your document (it will go grey), click on the *EndNote X7 tab*, then select the **Edit & Manage Citation(s)** command. The *EndNote X7 Edit & Manage Citations dialogue box* will open.

The citation you selected will be highlighted

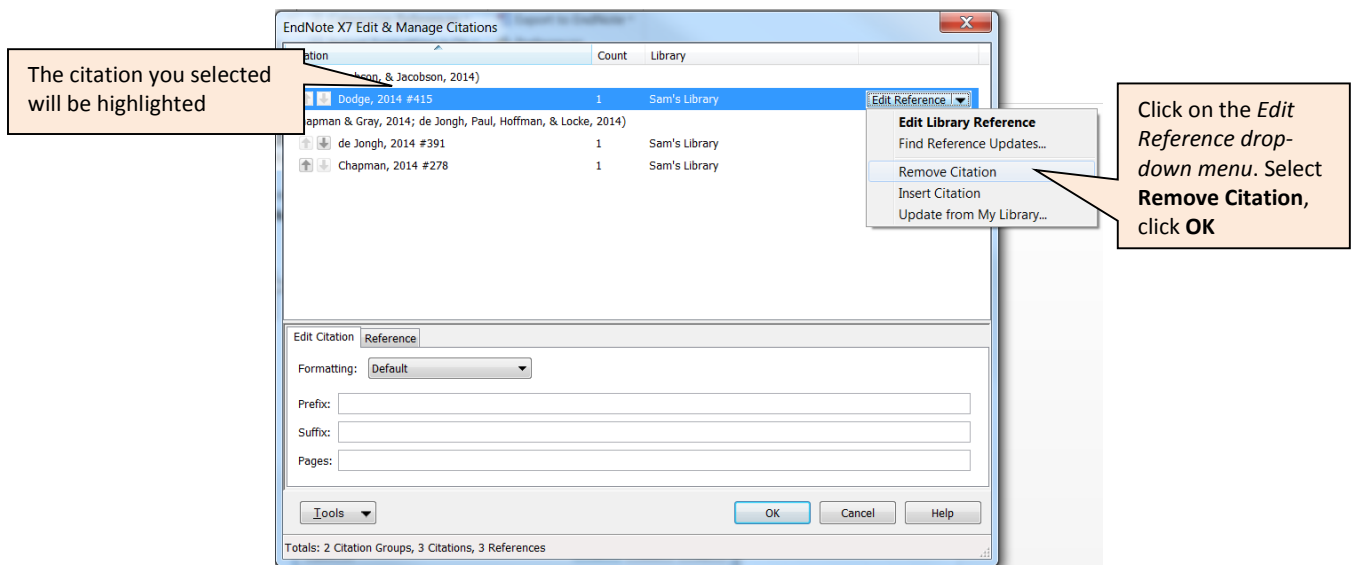Enter the page number in the *Pages field*

2. Type the page number or range of pages in the **Pages** box, click **OK.** The page numbers should appear in the in-text citation in the format specified by the output style, e.g. *(Evans, 1986, p. 313)*.

A Note about Page Numbers: In EndNote X7, adding page numbers using the **Edit & Manage Citation(s)** command will work if you are using the APA 6th or MLA output styles. If you are using a different style, and the page numbers you type in here do not appear in your in-text citation, it means that the output style you are using is not configured to recognise them. In this case, you could put them in the **Suffix** field. However, if you use the **Suffix** field for page numbers, you must also enter the punctuation and spaces exactly as you want it to appear in the text, e.g. *p. 313*.

Deleting a Citation from Your Document

If you have inserted a citation in error, or in the wrong place, **DO NOT USE** the **<Delete>** or **<Backspace>** keys on the keyboard to remove it. Select the reference in your document (it will go grey), and click on the **Edit & Manage Citation(s)** command on the **EndNote X7** toolbar.

The citation you selected will be highlighted

Click on the *Edit Reference drop-down menu*. Select **Remove Citation**, click **OK**


Moving a Citation Within (and Between) Documents

You can highlight any text that includes citations, then use Cut or Copy, and then Paste it elsewhere in the document.

BUT, if you move or copy ONLY the citation itself, make sure you highlight the ENTIRE citation (including surrounding delimiters). Then Cut or Copy and Paste it elsewhere in the document.

Instant Formatting

If references you insert from EndNote X7 into your Word document look like this: **{Jones, 2015 #14** - where Jones = author; 2015 = year; and #14 = the EndNote record number – it means that EndNote's **Instant Formatting** feature has been disabled.

To turn *Instant Formatting* back on in your Word document, select the *EndNote X7 tab*, click the dropdown arrow next to **Instant Formatting is Off**, and select **Turn Instant Formatting On**.
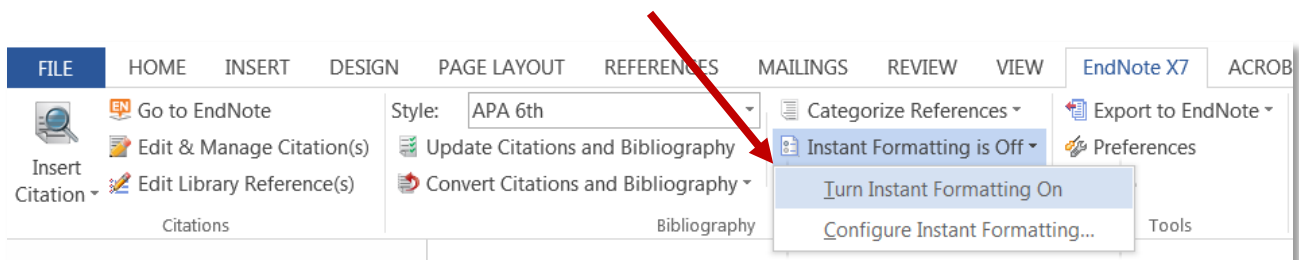
Creating a Bibliography or List of References on Its Own

There may be times when you simply want to produce a stand-alone list of references from your EndNote library. There are a number of ways in which you could do this. The simplest of these is described below.

1. Open your EndNote library, and select the references you want included in your list.

2. Select **References | Show Selected References**. This will hide the remaining references from view, so that only the selected references are displayed.

3. Select **File | Export**. The **Export file name** dialogue box will open.

4. Select the folder in which you want the file to be saved, type a name for the file, in the **Save as type** drop-down box, select **Rich Text Format (*.rtf)** from the list**,** select the required **Output Style**, e.g. APA 6th, then click **Save**.

Help and Further Information

- Within EndNote – click Help for a Getting Started Guide as well as the Online Manual

- The University of Newcastle Library's EndNote guide at libguides.newcastle.edu.au/endnote

- The *EndNote Support* site at endnote.com

- Your Faculty Librarian or Liaison Librarian (for Central Coast enquiries) – check www.newcastle.edu.au/library/support-for-researchers/faculty-librarians for contact details.