Introduction to EndNote X7



Introduction	2
Obtaining EndNote	2
Compatibility and System Requirements	
Upgrading from Earlier Versions of EndNote	
Creating and Managing your EndNote Library	3
The Library Window	4
Your Library's Data Folder	4
Adding References to Your EndNote Library	5
Manually Entering References	5
Guidelines for Entering References	6
Direct Export from Databases to EndNote	10
Using Connection Files	10
Importing Downloaded References with a Filter	11
A Word of Caution about Importing	12
Storing Documents and Images with Your Library	12
Attaching PDFs	12
Using the Find Full Text Command	12
Identifying Duplicate Records	13
Searching and Sorting Your EndNote Library	13
Grouping References	14
Global Editing of Records	15
Backing Up Your Library and Documents	15
Syncing Your Library	16
Using EndNote with Word to Create In-Text Citations and Reference Lists	17
Selecting Output Styles	17
Creating In-Text Citations	19
Using the 'Go to EndNote' command	19
Inserting multiple references	19
Using the 'Find Citation' command	19
Reformatting the Style or Layout of your Citations and Bibliography	20
Using Footnote Styles with EndNote	20
Editing Citations in Your Document	21
Excluding the Author Name	21
Excluding the Year	22
Adding Page Numbers after a Citation	22
Deleting a Citation from Your Document	23
Moving a Citation Within (and Between) Documents	23
Instant Formatting	23
Creating a Bibliography or List of References on Its Own	24
Help and Further Information	24

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: <u>www.newcastle.edu.au/current-students/campus-</u> <u>environment/information-technology/computers/software-for-home-use</u>

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 <u>www.newcastle.edu.au/library</u> search for "EndNote X7".
- Staff and RHD students requiring on-campus installation contact <u>17000@newcastle.edu.au</u>

Compatibility and System Requirements

See details at: <u>endnote.com/product-details/compatibility</u>

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.

Favorites Downloads Recent Places Documents library Research Name Date modifie Desktop Libraries Documents Mun Documents No items match your search. No items match your search. No items match your search. Tite name File name Sam's Library	Organize • Ne	w folder	_					0
Dropbox Mum Desktop Documents Music Pictures File name: Sam's Library	🛓 Favorites		•		brary			-
Mum No items match your search. Desktop No items match your search. Libraries Ausic Music Pictures File name: Sam's Library			-	Name	*		Date mod	lifie
Music Pictures +	📕 Mum 🔲 Desktop				No items match	i your search.		
Pictures v e III File name: Sam's Library								
				•	III			
and the second se	File name:	Sam's Library				1.55		•
Save as type: EndNote Library (*.enl)		EndNote Library (*.	enl)					

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 (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

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

File Edit References Groups	Tools Window Help	_ 8 ;
💕 🌑 🏠 Annotated	🔄 🌁 💁 🍳 🎸 🌶 🐑 🥩 🎬 👔 😥 🗞 🤡 Quick Search	P ▼ ▲ Hide Search Panel
My Library	Search Options Search Whole Library Match Case Match Words	Reference Preview Abel-1997-Low birth weig 🏮 4 🕨 🔻
All References (518) Search Results (66) Unfiled (447) Trash (0)	Author Contains Author Contains	C Restrict was downloaded by: [University of Newcastle, Australia] On: 16 New C 2015, At: 14-53 Aubisher: Routledge Informa Lift Restreter in England and Wales Resistered Number: 1072954
My Groups Fetal Alcohol Syndrome (6)	And V Title Contains Vear Title	Registered office: Mortimer House, 37-41 Mortimer Street, London W1T 33H, UK The Journal of Genetic Psychology: Research and
Low Birth Weight (66) Find Full Text Found PDF (218)	 Abdulrazzaq 1995 Obstetric risk factors affecting incidence of low birth weight in Abel, E. L.; 1993 Ratings of fetal alcohol syndrome facial features by medical pro Abel, E. L.; S 1991 A revised conservative estimate of the incidence of FAS and its Abel, M. H. 1996 Maternal characteristics and inadequate prenatal care 	GENETIC PSYCHOLOGY Theory on Human Development Publication details, including instructions for authors and subacryption information: http://www.tandforline.com/do/wpit20 Low Birth Weight and Interactions Between
U Found URL (17) ⊠ Not found (156)	 Abel, M. H. 1997 Low birth weight and interactions between traditional risk fact Abeywarda 2010 Prevalence of neural tube defects in Australia prior to mandato Aboujaoude 2006 Is testing for cytomegalovirus and cystic fibrosis indicated in metabolic content. 	Traditional Ritk Sectors Milcort H, Abil ^a Department of Public datify a profina University
2	Abrahamse, 1988 Teenagers willing to consider the provided of the pro	To cite this article: Million: N. Abel (1997) Low Brith Tomes Million: Million: Between ThatUsual Risk Factors, The Journal of Genetic Psychology, Neuran and Theory on Homes Development, 18:44, 44:44, 64:65, 10:10, 1000 (1021) 12:79595681 The link to this article: http://dx.du.org/10.1000/0022112:70595681
\smile	 Ackerman, 2012 Ethnic variation in allele distribution of the androgen receptor (Acosta, C. D 2013 The continuum of maternal sepsis severity: incidence and risk f 	PLEASE SCROLL DOWN FOR ARTICLE Taylor & Francis makes every effort to ensure the accuracy of all the information (the "Content") contained in the publications on our platform. However, Taylor & Francis, our gents, and our licensors make no no
	 Acton, R. T.; 1999 Associations of MHC genes with levels of caries-inducing organi Acton, R. T.; 1994 Genes within the major histocompatibility complex predict NID Adams, A. K 2005 Association of maternal smoking with overweight at age 3 y in Adams, M 2000 Rates of and factors associated with recurrence of preterm deli 	representations or warranties whistoever as to the accuracy, completeness, or suitability for any purpose of the Content. Any options and views expressed in this publication are the opioinn and views of the authors, and content should not be relied upon and should be ladeendently verified with primary sources of information. Taylor and francis shall not be liable for any losses, actions, claims, proceedings, demands, costs, openess, damages, and other liabilities whistoever or howsover caused anising directly or Content, should be activation to a raising out of the use of the Content, foundations of the claims of the claims of the claims of the Content, foundations of the claims of the claims of the claims of the content, foundations of the claims of the claims of the claims of the content, foundations of the claims of the claims of the claims of the claims of the content.

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.

	ocume	nts ▶ Research ▶		1.*)(Search R 🔎
Organize Share with	Bur	n New folder		•	
💻 Desktop	^	Documer Data f	folder (.Data) and	ge by: Folder -	
Libraries	-	Name	Date modified	Туре	
Music	-	Sam's Library.Data	17/03/2015 8:53 A	File folder	
S Pictures		Sam's Library	17/03/2015 8:50 A	EndNote Library	
JUI Videos					Select a file to preview.
💐 Computer		EndNote	ibrary (.enl)		
by System (C:)					
🛫 entities (\\uncle.newcastle	e.e				
ad_lib (\\divisions) (S:)					
🛫 home (\\staff) (U:)					
See ERA (\\divisions\urd) (Z:)	-	<	111	,	

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

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

New Reference Window.

- 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.

😻 EndNote X6 - [New Reference]
😻 File Edit References Groups Tools Window Helf
🖛 🔿 Reference 🔁 Attached PDFs 🛛 🕅
🔁 🛛 🧐 🦢 😿 🥱 🐛 🗐 📰 🗞 Plain Fo
Reference Type: Journal Article
Rating
Author
Year
Title
Journal

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
	 Year of Publication Title Place of Publication Publisher Edition (if provided) If the book is online – the DOI or URL 	File Edit References Groups Tools Window Help Image: Second Se
 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 	Added to Library: 17/03/2015 Last Updated: 17/03/2015 Layout EndNote X7 - [Hazelton, 2011 #520] Image: Comparison of the second se	
	Reference Type: Book Section • <td< td=""></td<>	
		Hershey, PA Publisher Medical Information Science Reference Pages 135-149 Added to Library: 17/03/2015 Layout

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 Reference Type: Journal Article Reference Type: Journal Article Plain Font Plain Size Plain Size Plain Font Plain Size Plain Font Plain Size Plai
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

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: <u>libguides.newcastle.edu.au/endnote</u> - 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:

 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.

EndNote X7 - [Online Mode]		The last New Mind	ter neg	
Pile Edit References Gr	oups	Tools Window Help		- 6 ×
🐞 🔇 😵 Annotated		· 🖣 💽 🔕 🖌 🗲 😭	🥘 🦆 👔 🔢 🔄 😤 🔞 Quick Search	O a A Ulida Casarda Darad
My Library		Search Options	Search Remote Library	Indicates you are connected
Online References	(0)			to the Library catalogue.
🗑 Online Trash	(0)	Author 🗸	Contains 🔹	
🖃 Online Search		And Author/Title/Subject	Contains -	+ -
Q Library of Congress	(0)	And 🔻 Title 💌	Contains 🔹	+ -
🔍 LISTA (EBSCO)	(0)			Search boxes used for
Q PubMed (NLM)	(0)	Author Year Title		
🔇 U Newcastle	(0)			searching the
Q Web of Science Core	(0)	References iden	tified from the search are loaded into	catalogue/database.
more		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.

			nd 233 records.
15	through 1		rieve records from:
s.	retrieving records.	ed res	Elear currently displaye
5.	recrieving records.	eu re:	piear currency displaye
- Parties	retrieving record	ed re:	Clear currently displaye

- 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.

EndNote	•
1	Are you sure you want to discard all online references? This cannot be undone.

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:

<u>libguides.newcastle.edu.au/endnote</u> – 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*.

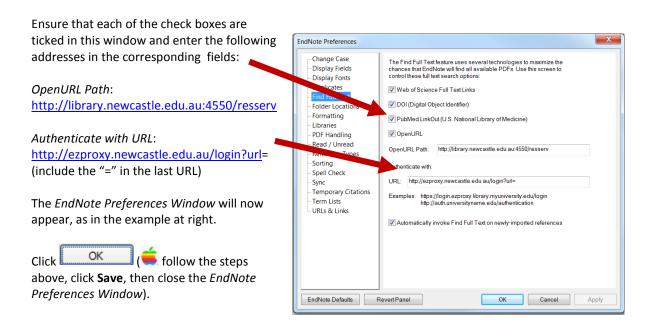
Up to 45 files may be attached to each record.

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



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.

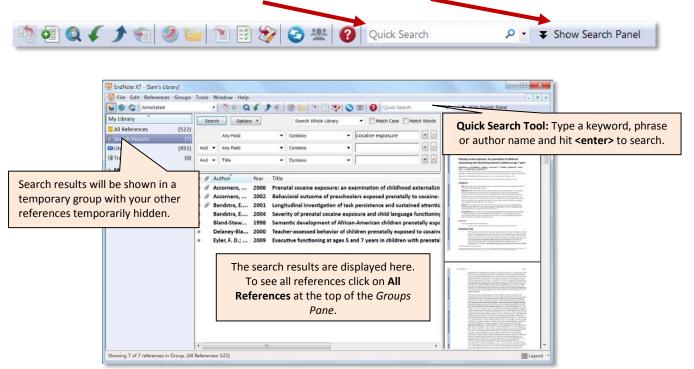
It is important to follow up this automatic checking process with a manual check for duplicates.

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.



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

		Name: Substance				
		Any Field	•	Contains	 alcoholism 	± [
Or	٠	Any Field	•	Contains	✓ substance abuse	•
Or	•	Any Field	•	Contains	✓ alcohol abuse	

Choose the appropriate Boolean Operator (AND, OR, NOT), then click **Create**. To hide the *Groups Panel* click on **Groups | Hide Groups.**

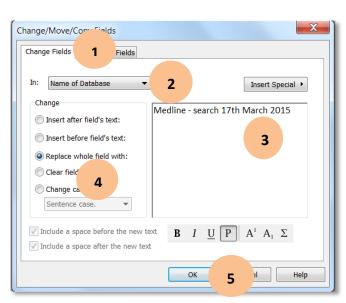
Global Editing of Records

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)
- Type the text to be added into the text box (eg. Medline – search March 17th 2015)
- 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
 Quick Search
 Quick Search
 P
 ▼ Show Search Panel
- 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:

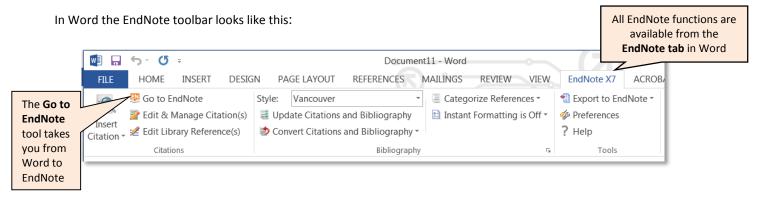


Important Points about Syncing

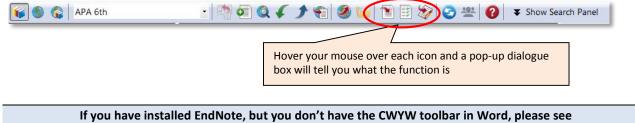
- Sync works with only one library and one EndNote Web account.
- You can always cancel a Sync process that is currently in progress. However, EndNote processes all information that has gone through the Sync process up to the cancellation point. If there are conflicts between references in EndNote and 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 EndNote the tools used to insert citations into Word looks like this:



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 <u>endnote.com/downloads/styles</u>

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

w] .	რ ∽ (5 -		Document	11 - Vord)
FILE	HOME INSERT DESIG	N PAGE LAYOU	T REFERENCES	LINGS	REVIEW VIEW	EndNote X7	ACROE
Insert	 Go to EndNote Edit & Manage Citation(s) Edit Library Reference(s) 	_	ns and Bibliography		orize References - Formatting is Off -	Export to EnPreferencesHelp	dNote ▼
	Citations		Bibliography		5	Tools	

- Click Select Another Style ... The EndNote Styles Window lists all available reference styles. Styles may be resorted 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**.

EndNote X7 - [Sam's Library]										
🐺 File Edit	Eile Edit References Groups Tools Window Help									
💕 🌒 😵	Annotated	_		- 🖻 💽 🔍 🖌						
My Library	Select Anothe	r Style		Doptions						
📕 All Referen	Annotated Author-Date									
Unfiled	Harvard			Author						
🗑 Trash	Numbered Vancouver			Year						

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.

EndNote X7 - [Sam's Library]	-	-	1 2	-	-	1000 Bill 100				
🐺 File Edit References Grou	ips T	ools	Window H	elp						_ <i>8</i> ×
👔 🌒 🔍 APA 6th	>		•	Q 🗸)	£ 🧶 🍅 🗎	1	2 🖳 🕄	Quick Search	P ど 🛧 Hide Search Panel
My Library	S	earch	Options	; ▶	Se	arch Whole Library	-	Match Case	Match Words	Preview 🔁 Attached PDFs 🛛 🗸 🔻
All References (522)										Pitt, V., Powis, D., Levett-Jones, T., & Hunter, S.
Unfiled (451)			Author		•	Contains	•			(2015). The influence of critical thinking
🗑 Trash (0)	And	•	Year		•	Contains	-		+ -	skills on performance and progression in a pre-registration nursing program. Nurse
⊡ My Groups	And	•	Title		-	Contains	-		+	Education Today, 35(1), 125-131.
🗎 Fetal Alcohol Syn (6)										doi:10.1016/j.nedt.2014.08.005
Low Birth Weight (66)	• 6	A	uthor	Year	Title					
⊡- Find Full Text	•	Pi	tt, Victoria	2015	The in	nfluence of critical	thinking sl	tills on perfor	rmance and p	
	0	Ha	and Hygien	2015	What	is hand hygiene?				

Finding and Downloading Additional Output Styles

 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

Name	Category	*				
APA 5th title only	Psychology	-				
APA 5th UoN	Psychology	Ħ				
🖌 APA 6th	Psychology					
APA 6th - Sentence Case	Psychology					
APA 6th (sections)	Psychology					
APA 6th all authors	Psychology					
APA 6th Copy	Psychology					
APA 6th CV	Generic					
and the second	Autos:					
	Get More on the Web Mark All Unmark All Find by					
		_				
★ Less Info:	Style Info/Preview Edit	-				
File Name: APA 6th.ens						
Created: Monday, 29 Sep	stember 2014, 10:35:27 AM					
Modified: Saturday, 14 Fe	bruary 2015, 6:01:56 PM					
Based On:						
Category: Psychology						
	based on the Publication Manual of the APA, 6th ed.	1				
Comments: This style is						
Comments: This style is I						

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.
- 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).

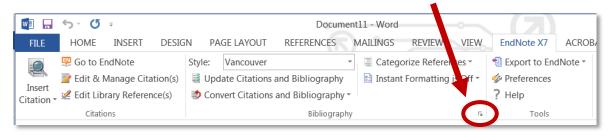
- Enter your search term in the Search box, then click Find. References containing your search term will be displayed.
- Select the required reference (multiples can be selected by holding down the <**Ctrl>** key on your keyboard while selecting), then click



Author	Year	Title	
Barlow	2013	Effect of a paraprofessional home-visiting intervention on American Indian teen m	otho
Barron	2008	Associations between psychiatric disorders and menstrual cycle characteristics	ounci
Chang	2003	Characteristics and risk factors for adverse birth outcomes in pregnant black adole	scer
Chiodo	2009	A metric of maternal prenatal risk drinking predicts neurobehavioral outcomes in p	
Cornelius	2002	Alcohol, tobacco and marijuana use among pregnant teenagers: 6-year follow-up	
Crosby	2002	Predictors of infection with Trichomonas vaginalis: a prospective study of low inco	
Curry	1998	The interrelationships between abuse, substance use, and psychosocial stress dur	ing p
Curry	1998	Abuse among pregnant adolescents: differences by developmental age	
Day	2006	Prenatal marijuana exposure contributes to the prediction of marijuana use at age	14
Day	1994	Effect of prenatal marijuana exposure on the cognitive development of offspring a	t age
Dodd	2001	Petrol sniffing in a pregnant Aboriginal population: a review of maternal and neon	atal
Elo	2010	Variations in health and health behaviors by nativity among pregnant Black women	ı in F
•			

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**.



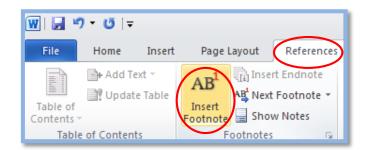
The EndNote X7 Format Bibliography dialogue box will open.

	EndNote X7 Configure Bibliography	1) Click on the Layout tab	
3) Add a title for your bibliography		Cancel Help	2) Change the font style and size to match the rest of your document 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.

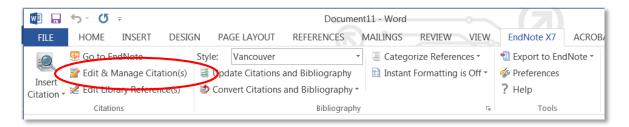
In Word, place the cursor against the statement you are referencing. To create a footnote, select References
 Insert Footnote.



- 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.

	EndNote X7 Edit & Manage Citations	Constitution -		X
	Citation	Count	Library	
The citation you selected	Codge, Jacobson, & Jacobson, 2014)			
will be highlighted	👚 🕒 Dodge, 2014 #415	1	Sam's Library	Edit Reference
	(Chapman & Gray, 2014; de Jongh, Paul, Hoffman, & Loo	cke, 2014)		
	👚 🖶 de Jongh, 2014 #391	1	Sam's Library	Edit Reference
	👚 🖶 Chapman, 2014 #278	1	Sam's Library	Edit Reference
	Edit Citation Reference			
	Formatting. Default			
	Prefix: Display as: Author (Year)		From the Formatting	z drop-down
	Exclude Author	~	menu select Exclude	
	Suffix: Exclude Year Exclude Author & Year			Author
	Pages: Show Only in Bibliography		L	
	Iools 🔻		OK Canc	el Help
	Totals: 2 Citation Groups, 3 Citations, 3 References			.4

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

 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.

	EndNote X7 Edit & Manage Citations	to Codfigure *	X						
	Citation	Count Libra	iry						
The citation you selected	(Dodge, Jacobson, & Jacobson, 2014)								
will be highlighted	Dodge, 2014 #415	1 Sam'	s Library Edit Reference I						
5 5	(Chapman & Gray, 2014; de Jongh, Paul, Hoffman, 4	& Locke, 2014)							
	👚 🖶 de Jongh, 2014 #391	1 Sam'	s Library Edit Reference						
	👚 🖶 Chapman, 2014 #278	1 Sam'	s Library Edit Reference I						
	Edit Citation Reference								
		Edit Citation Reference							
	Formatting Default								
	Default Prefix: Display as: Author (Year)								
	Exclude Author		From the Formatting drop-down						
	Exclude Author & Year		^I menu select Exclude Year						
	Pages: Show Only in Bibliography		1						
	Tools -		OK Cancel Help						
	Totals: 2 Citation Groups, 3 Citations, 3 References								

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.

	EndNote X7 Edit & Manage Citations	office -	X
	Citation	Count Library	
The citation you selected	dae, Jacobson, & Jacobson, 2014)		
will be highlighted	🕥 🔄 Dodge, 2014 #415	1 Sam's Library	Edit Reference
	(Chapman & Gray, 2014; de Jongh, Paul, Hoffman, & Loc	(e, 2014)	
	👚 🎩 de Jongh, 2014 #391	1 Sam's Library	Edit Reference
	👚 🕒 Chapman, 2014 #278	1 Sam's Library	Edit Reference
	Edit Citation Reference		
	Formatting: Default		
	Prefix:		
	Suffix:	nter the page number in the	
		ages field	
	<u>I</u> ools •	ОК	Cancel Help
	Totals: 2 Citation Groups, 3 Citations, 3 References		.41

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.

	EndNote X7 Edit & Manage Citations	- and the second			
The citation you selected	ation & Jacobson, 2014)	Count	Library		
will be highlighted	Dodge, 2014 #415 apman & Gray, 2014; de Jongh, Paul, Hoffman, & Lock	1 xe, 2014)	Sam's Library	Edit Reference	Click on the Edit
	 de Jongh, 2014 #391 	1	Sam's Library Sam's Library	Find Reference Updates Remove Citation Insert Citation Update from My Library	Reference drop- down menu. Select Remove Citation, click OK
	Edit Citation Reference Formatting: Default Prefix: Suffix: Pages: Iools Totals: 2 Citation Groups, 3 Citations, 3 References		ОК Са	ncel Help	

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**.

FILE	HOME	INSERT	DESIG	in pa	GE LAYOUT	REFERENCES	Ν	AILINGS	REVIEW	VIEW	EndN	ote X7	ACROB
-	\rm Go to E	ndNote		Style:	APA 6th		-	Catego	orize Referer	nces *	1 Expo	ort to End	dNote -
So to Entitation (s) I and the second se					🗃 Update Citations and Bibliography 🔰			🗈 Instant Formatting is Off 👻			🍻 Preferences		
Insert Citation - 😢 Edit Library Reference(s)				🧐 Con	Convert Citations and Bibliography •			Turn Instant Formatting On					
	Citations				Bibliography			Configure Instant Formatting			Tools		

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** dropdown 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 <u>www.newcastle.edu.au/library/support-for-researchers/faculty-librarians</u> for contact details.