


## ENDNOTE X3 ESSENTIALS






### Install EndNote

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- EndNote installs into  Finder > Applications > EndNote X3
- Default is: *Create a new free EndNote Web account*; you may wish to change to *Do not integrate with EndNote Web at this time*
- To make sure your version is up-to-date select **Help** on the menu bar then click on **EndNote Program Updates**




### Exercise 1 Start EndNote

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- OPTION A: Open  Finder > Applications > EndNote X3 > EndNote Program 
  - OPTION B: From within Word (2008): Using the EndNote toolbar 
-  click on **Go to Endnote** 

### Exercise 2 Open an EndNote Library and view some records

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- In EndNote go to **File > Open**
- Find **Sample\_Library\_X3.enlx** (a practice Library that comes with EndNote)  
**Hint** It is in the *Examples* folder: *Finder\Applications\EndNote X3\Examples*
- Double-click on a reference to display the full details. (It opens in a new window).
- Click on the *Toggle Empty Fields*  button to collapse fields without information; click on *Toggle Empty Fields*  to restore all fields.
- Use the arrows (top left) to move forwards or backwards in the list of references. 
- Close the full reference by clicking on the lower 'x' at the top left of the window.

### Exercise 3 Sort references in a Library

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- Quick and easy: Click on column headings; click again to reverse. Try it with *Author*.
- Use **Tools > Sort Library** for a more complex sorting of references. The default is to sort by author (first) and within author by year (second).  
Click on the A-Z icon to select ascending/descending order.

#### Exercise 4 Searches within a Library

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- Quick and easy: Click on a column heading. Then start typing the name that you want for that field. Try it with author. Find the author *Turner* quickly. There is also a Quick Search box on the main toolbar.
- For more advanced searching use **Tools > Search Library** OR click on the Search tab above the Preview pane
- Select the field that you wish to search within then type in search terms.  
Use the AND operator (default) to combine terms.  
To search for any references containing the word bats & published after 1990:

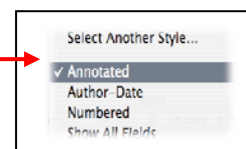
	<b>Any Field</b> (at top of list)	<b>Contains</b> (default)	<b>bats</b>
AND (default)	<b>Year</b> (Date = default)	<b>Is greater than</b>	<b>1990</b>

- Return to the full list of references: Click on **All References** in the My Library pane (Left hand side of the screen).  
Note: The most recent search results are in the **Search Results** Group.
- Search for references by the author Billoski then return to the full list of references.

#### Exercise 5 Select a bibliographic style

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- Display the Preview pane
- Select the style of your choice from the drop-down menu.  
Use **Select Another Style** if your style is not listed



- Select (highlight) a reference in your Library. This will now be displayed in the style that you chose.

**NOTE:** EndNote X3 installs only the most popular 100 Styles. Supplementary styles are available:

- QUT - <http://www.library.qut.edu.au/services/endnote/styles.jsp> (QUT APA, QUT Harvard)  
e.g. *QUTAPA5th12June09.ens*
- ISI web site - <http://www.endnote.com/support/enstyles.asp>
- Download the selected file and save it to your Styles folder, which is typically located at Finder\Applications\EndNote X3\Styles. (Note: you will need to be the Mac's administrator.)
- If EndNote is still open, *Exit* the program and then restart EndNote. Choose Select Another Style, and find the new style in the dialogue box.

#### Exercise 6 Create a new EndNote Library


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- **File > New**
- Name your library. An **.enl** extension will automatically apply.  
Make a note of where you save it. You might like to use the Examples folder  
*Finder\Applications\EndNote X3\Examples*
- You are now ready to begin adding references.

## ADD REFERENCES TO YOUR LIBRARY

### Exercise 7 Add references manually

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- With your Library open, select **References > New Reference** or click on 
- Select the appropriate Reference Type. (Journal article is the default.)
- Follow the guidelines on the *Entering References* handout for the following examples:

#### Journal article:

Szabo, A. (2003). The acute effects of humor and exercise on mood and anxiety. *Journal of Leisure Research*, 35(2), 152-162.

#### Book:

Rosenberg, M. S., Wilson, R., Maheady, L., & Sindelar, P. T. (2004). *Educating students with behaviour disorders*. Boston: Allyn & Bacon.

#### Book chapter:

**HINT:** Use the **Book Section** reference type

Freud, S., & Breuer, J. (1998). Studies in hysteria. In J.M. Jenkins, K. Oatley & L. Stein (Eds.), *Human emotions: a reader* (pp. 30-38). Oxford: Blackwell.

#### Web page:

Hint: Use the **Web Page** reference type for online sources other than electronic journal articles (use **Electronic Article**), electronic books (use **Electronic book**).

White, A.M. (n.d.) *Alcohol and adolescence*. Retrieved January 10, 2008, from <http://www.duke.edu/~amwhite/Adolescence/>

### Exercise 8 Add references using DIRECT EXPORT

- Search on your topic in the database of your choice.
- Mark the Reference(s) that you wish to export.
- Follow the Direct Export procedure for that database.

*Some examples*

Database	Procedure
<b>EBSCOhost</b>	Go to <b>Folder View</b> . Select records. Click on the <b>Export</b> icon Select <b>Direct Export to EndNote...</b> (default) Click on <b>Save</b>
<b>Informit</b> <i>A+ Education</i> <i>APA-FT</i> <i>Health Collection</i>	Click on <b>Save</b> Change the Output Format to <i>EndNote Direct</i> Click on <b>Save Records</b> Note: Not all Informit databases work well with Direct Export
<b>ISI</b> <i>Current Contents</i> <i>Web of Science</i>	Click on <b>Add to Marked List</b> . Click on <b>Marked List</b> ...[Output options box]: select extra fields eg. <i>keywords, abstract</i> Click on <b>Save to EndNote,RefMan...</b>
<b>ProQuest</b>	Click on <b>My Research ...marked items</b> Click on <b>Export Citations into EndNote...</b> Click on <b>Export directly to ProCite, EndNote..</b>
<b>ScienceDirect</b>	Click on <b>Export Citations</b> ...[Export Citations dialogue box]: select <i>Citations and Abstracts</i> <i>RIS format (for Reference Manager, ProCite, EndNote)</i> Click on <b>Export</b>
<b>Google Scholar</b>  <i>NB: can only import 1 reference at a time</i>	Configure to send reference to EndNote <ul style="list-style-type: none"> <li>○ Click on <b>Scholar Preferences</b></li> <li>○ Under <b>Bibliography Manager</b> select <b>Show links to import citations into</b> and choose <b>EndNote</b></li> <li>○ Click on <b>Save Preferences</b></li> </ul> Import search results into EndNote <ul style="list-style-type: none"> <li>○ Search Google Scholar</li> <li>○ Click on <b>Import into EndNote</b> for the reference you want</li> <li>○ Choose <b>Open</b> from the file download window</li> </ul>
<b>Quick Find (QUT)</b>	Click on <b>Save this Item</b> Click on the folder of <b>Saved Items</b> Select the <b>EndNote</b> tab Choose <b>Open</b> from the file download window

- EndNote automatically opens with your most recent Library available
- Only the exported records display  
The most recent export is in the **Imported References** Group
- Open records and check content - change as necessary; add any comments.

## CHECKLIST

Refer to the *Entering References* handout for specific details.

<i>Essential</i> to open each record and check content	
<b>Reference Type</b>	Is this correct?
<b>Author(s)</b>	Is capitalization and spacing correct? Are family names and first names in the correct order?
<b>Year</b>	Is the year of publication in this field?
<b>Article Title</b>	Check words that are capitalized – are they appropriate? Make sure there is no full stop at the end.
<b>Journal Title</b>	Make sure there is no full stop at the end. Check capitalization. Use full journal names. Change if they are imported as abbreviated.
<b>Pages</b>	Is the page range given? Some only show the initial page number.

- Select the style of your choice and use **Preview** to check if any errors persist in the Reference or if there are any limitations with the EndNote version of the style selected. **Know your style well and what it should look like.**

Add additional information to your reference:


- **Name of Database** field – enter the database name where you found the fulltext of your article.
- **Access Date** field – enter today's date.

**HINT:** Try a global change for all your new references, by selecting the option:

**Tools > Change and move fields**

Select the **Access Date** field from the drop-down menu.

*Insert before field's text:* Type in the date e.g. *April 30, 2010* then Click OK.

- The **Label** field is one commonly used to identify references, for example:
  - Read or unread
  - Document delivery request date
  - Assignment title/ Paper for Journal... / Thesis
- You can store files with references in your Library – pdf, Word documents, image files... The files will be copied from their existing location on your computer and stored in a PDF folder, which is part of the .Data folder attached to the Library.
  - Locate a pdf file relating to one of your new references.  
Drag and drop it onto a reference or into the **File attachments** field in that reference  
OR right click on the reference > **File attachments > Attach file.**  
A pdf icon appears in the File Attachments field. Up to 45 files can be stored here.  
A paperclip icon  appears next to the Authors name in the Reference list.
  - To open your file:  
Open the reference. Double click on the file in the **File Attachments** field.
- To display your whole Library including the new references select **All References** in the Groups pane.

## MY LIBRARY FOLDERS

Notice the *My Library* pane on the left. There are several types of **GROUPS** listed here.

**Permanent** – cannot be removed or renamed

- **All References** - Every reference in your Library
- **Unfiled** - References that are not part of a custom group
- **Trash** - References removed but not yet permanently discarded  
**References > Move References to Trash** OR drag and drop into the group  
**Groups > Empty Trash** to permanently remove
- **Online Search**
- **EndNote Web**
- **Find Full Text**

**Temporary** - always deleted when you close your Library

**NOTE:** Only the groups are deleted, the references remain in your Library.



Holding place for the most recent set of:

- Copied References (via **Online Search**)
- Duplicate References (**References > Find Duplicates**)  
Side-by-side panes display the original and the first duplicate copy
- Imported References (Results of Direct Export; **File > Import**)
- Search Results (search in current Library)
- Find Full Text (**References > Find Full Text**)

**My Groups** – **created by you**; can be deleted (references remain in your Library) or renamed

**NOTE:** Better than setting up separate libraries for each topic

The contents of each group set are listed alphabetically. Click the *My Library* header to toggle between ascending and descending order.

-  **Custom Groups**  
**Create Custom Group**  
**Groups > Create Group** OR  
Right click on 'My Groups' then select **Create Group**  
Name your group  
**Add References to your Custom Group**  
**Groups > Add References To** OR  
Drag and drop them into the Group OR  
Right click on the references and select **Add References To** and select your group or create a new group (the selected references will be automatically be added).
- Exercise 9**  
Have a go at creating a Custom Group for your topic
-  **Smart Groups** – You can set search criteria to dynamically update these groups  
**NOTE:** Have all references displayed  
**Groups > Create Smart Group**  
Name your group. Enter a search (e.g author, keyword, etc) and click on Create. The group of search results is saved. When an existing reference is edited or a new reference is added to your library, they are checked against the search query. If there is a match, they are **automatically added** to the Smart Group.
  - Create **Group Sets** to organize your custom groups and smart groups.  
Group Sets for *Sample\_Library\_X3.enlx* include *Paleontology, Bats and Abstract Art*  
**Groups > Create Group Set** OR  
Right click on **My Groups** then select **Create Group Set**  
Double click on '**New Group Set**' to rename




## ENDNOTE AND WORD WORKING TOGETHER

The EndNote toolbar should automatically appear in Word when you install the EndNote software.




**HINT:** If it is not showing go to **View > Toolbars** and select EndNote X3. It is quicker and easier to use than the drop-down menus.

### Exercise 10 Insert a citation into text


- In your EndNote Library highlight the reference(s) that you wish to insert. Select multiple references by holding down the Command key 
- In Word (2008):
  - Place the cursor where you need to insert the citation(s).
  - On EndNote toolbar: Click on **Insert Selected Citation(s)** . If the reference appears unformatted turn on *Instant formatting*  (In the Format Bibliography dialogue box, Click on the Instant Formatting Tab, and Select *Turn On*).
  - The in-text citation appears and a Bibliography is automatically generated at the end of your document.

### Exercise 11 Edit in-text citations (Add page numbers...)

- In Word (2008), highlight the in-text citation you wish to edit. Right click > **Edit Citation(s)** OR choose **Edit Citation(s)** from the EndNote toolbar 
- Use the Pages box to enter page numbers e.g. 67 - 71
- Use the Prefix box to add comments like *See also*. (Include a space at the end of your text)
- Use the Suffix box for additional information e.g. , Table 2 (Include appropriate spaces)
- To omit authors' names from citations, tick the *Exclude Author* box.
- To omit the year from citations, tick the *Exclude Year* box
- Click on *Remove* to delete the citation from your Word document.
- If you click on *Insert* it gives you the option to search your EndNote Library for specific references (enter first author and year, no 'and' needed).

**NOTE:** If you manually make changes to the in-text citations and bibliography, every time you add another citation using EndNote, all that extra typing will disappear. That's why you need to use **Edit Citation(s)**.

### Exercise 12 Change the style of your citations and bibliography in Word

- In Word, open **Tools > Format Bibliography** or click on 
- Select a new style from the Output Style drop-down menu.

### Exercise 13 Backup your EndNote Library


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Don't lose all your hard work! Save it in more than one place, on more than one computer – at home, at work, to flash (USB) drive, burn it to a CD.

- Select **File > Compressed Library** to compress the Library (.enl file) and its attached folders into a single file to save. *The file extension will be .enlx.*  
**NOTE:** The Data folder contains a PDF folder (copies of articles attached to your references) and information on any Groups that you have set up.
  - Default = **All References in Library**  
Options = *Selected Reference(s); All References in Group/Group Set*
  - Default = **With File Attachments**  
Option = *Without File Attachments* (You may not want to attach files if sending to another institution for copyright reasons)
- The compressed file unzips automatically when you open it in EndNote.

### More information about EndNote

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- Help button on the EndNote Library toolbar 
- User manual (pdf) - loads onto your MAC with the EndNote software  
**Finder/Applications/EndNote X3/EndNote.pdf**
- QUT Library EndNote Help  
<http://www.library.qut.edu.au/services/endnote/>
  - **Styles** – download QUT APA style and QUT Harvard style
  - **Connect files** – download the connect file for the QUT Library catalogue
  - **Online tutorials** – access the 'Endnote essentials' powerpoint & links to other online tutorials
  - **Endnote Help & FAQs**
- University of Queensland EndNote Help  
<http://www.library.uq.edu.au/faqs/endnote/>
- EndNote website online Help  
<http://www.endnote.com/support/ensupport.asp>  
*www.endnote.com/training has online video tutorials*
- EndNote & Mac online Help  
<http://www.endnote.com/ENMac.asp>
- Adept Scientific – English distributors of EndNote  
<http://lists.adeptscience.co.uk/endnote/>
- Google! Many problems and solutions can be found by searching on Google

**Congratulations! You have mastered EndNote Essentials.**