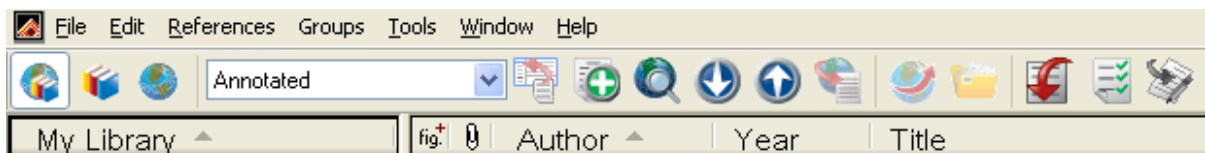


## Getting started with EndNote X4 (Word 2010)

### A brief guide for Business and Economics



#### Learning objectives:

At the end of the course you will be able to:

- Use EndNote to store details of material you have read
- Import records from Library databases
- Use the group options to manage references
- Insert citations from EndNote into a Word document
- Format and unformat the citations in your Word document

#### Need more help with EndNote?

**TRY ...** <http://www.library.auckland.ac.nz/endnote/endnote.htm> ... **OR ...**  
<http://www.endnote.com>

EndNote is a specialised database program for storing and managing bibliographic references. It allows you to enter references manually and import references from library databases. You can add your own notes, abstracts and other material to the references. The references can be sorted and searched, and incorporated automatically into papers for publication. EndNote makes writing academic papers easier, not only by saving you time, but also by ensuring your references are cited consistently.

This brief guide covers the basic skills required to get started using the latest version of EndNote. For more information the **help screens** in EndNote are very useful and these can be accessed by clicking on the **Help** option on the menu bar at the top of the screen toolbar, or the **Help** icon on the toolbar.

## 1. Downloading EndNote

Full instructions for downloading Endnote X4 from the Library website:

<http://www.library.auckland.ac.nz/endnote/endnoteinstall.htm>

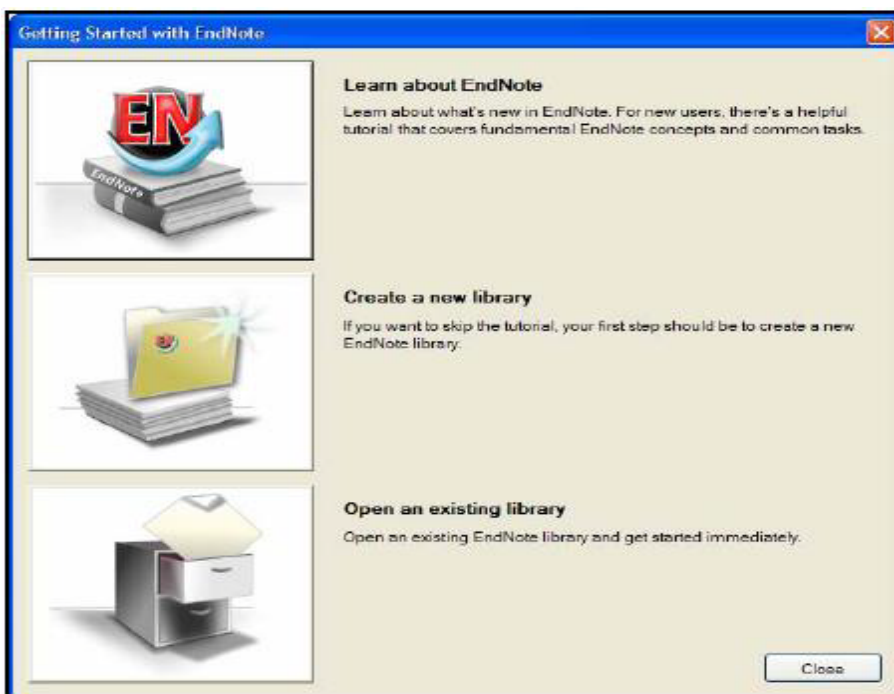
This web page also includes information on common downloading problems and contact details if further help is required.

## 2. Keyboard shortcuts

There are a number of keyboard shortcuts you can use with Endnote. The most useful of these is **Ctrl+W** which closes the active window. **Ctrl+N** (new reference) and **Ctrl+M** (show all references) are also useful.

## 3. Opening Endnote

Locate the **EndNote Program icon** on your Start menu. Click on the EndNote Program icon. If this is the first time that you have used EndNote, you will see this dialogue box:



An EndNote file is called a **library**. It is a database containing a separate **record** for each reference. Each record is made up of several **fields** containing specific pieces of information.

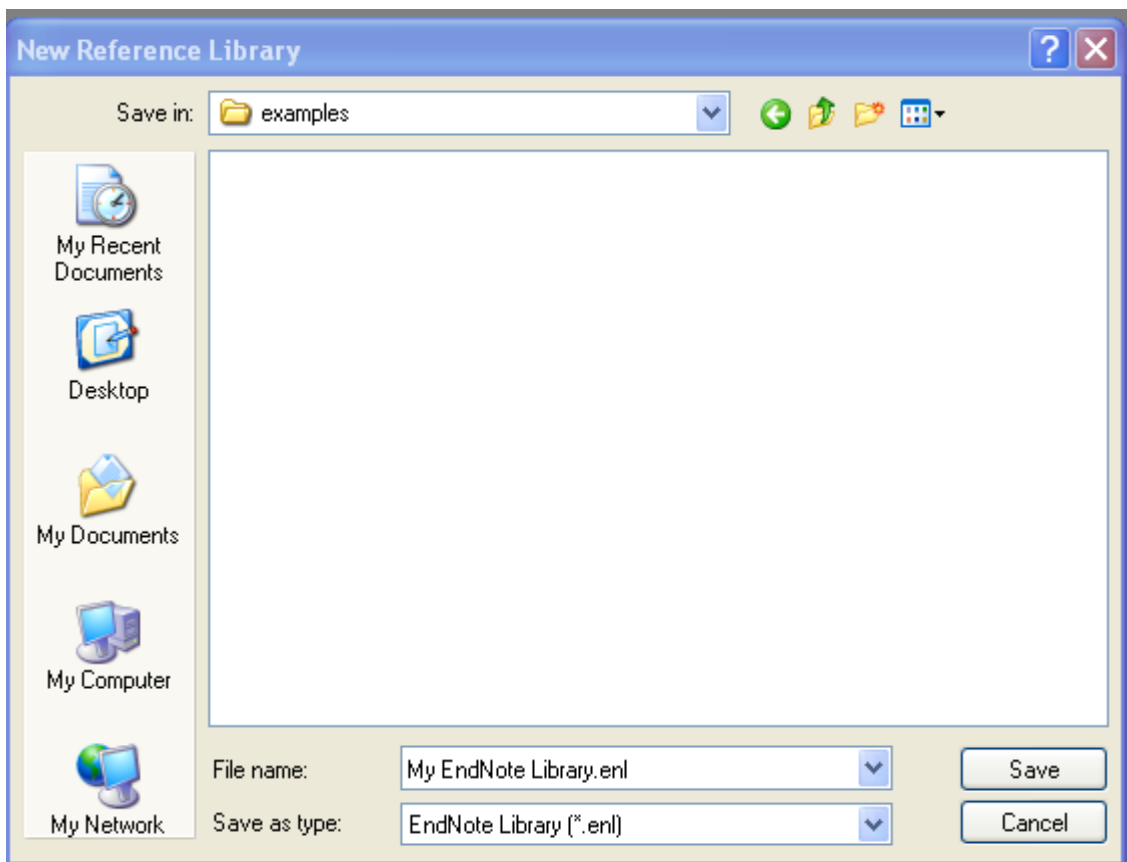
Although you can create as many libraries as you want it is generally recommended that you maintain only one. All references can be stored in the one library and labelled or grouped to reflect any particular subject interest.

You can set up a default library, which will open automatically when you open EndNote. To do this, select: **Edit --Preferences--Libraries**

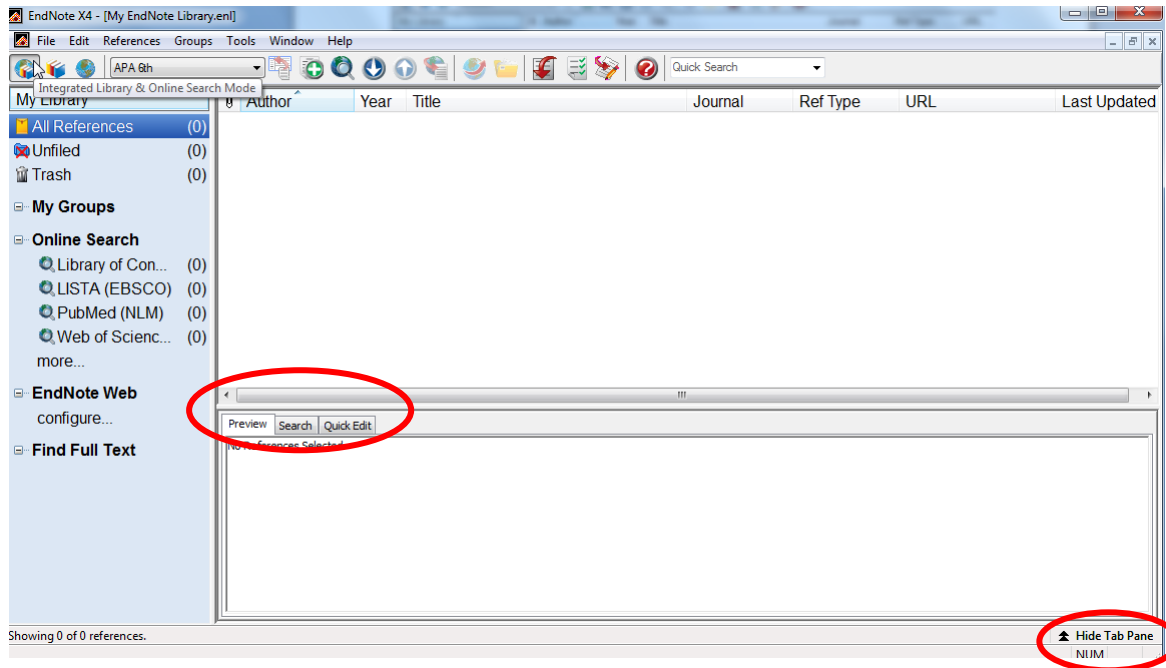
#### 4. Creating a new library

Click the **Create a new library** graphic. (see above)

You will see the following dialog box, with **My EndNote Library.enl** as the name of the new library.



- Enter a name for your new library in the 'File name' area.
- Click **Save**.
- The new file is an empty EndNote library, showing "0 out of 0 references."



The **Preview Tab** at the bottom of the library window will show you what your formatted references look like. The **Search Tab** is used for **searching** your library or a remote database and **Quick Edit** allows you to make changes to the record without opening it. To close all these tabs, click on **Hide Tab Pane**.

The **Groups Pane** at the left of the library window allows you to organise your references into groups. You can close the Groups Pane by clicking on the **Groups** option on the top menu bar and selecting **Hide Groups**.

## 5. Backing-up your EndNote Library

It is essential that you make a backup of your EndNote library in case disaster strikes! As well as saving a copy on the computer you are working on it would also be useful to save a copy on another disc or drive. You can use this copy to restore your lost or damaged EndNote Library.

### Save a Copy

You can save a copy of both your .enl file and its associated .data file to use as a backup or to send to someone using any version of EndNote.


- Open the Library in EndNote
- From the **File** menu, select **Save a Copy**
- Use the file dialog box to select where you want to save your back-up copy.

OR

### Save a compressed copy

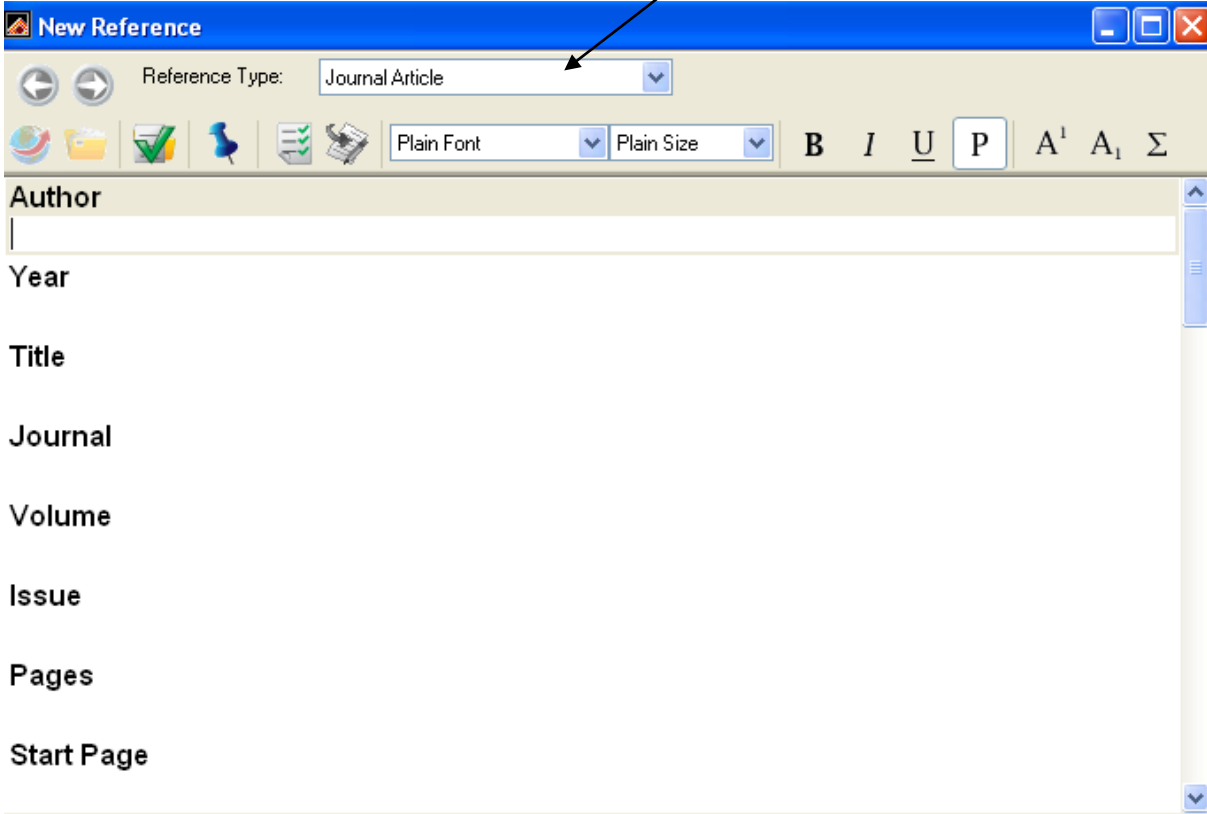
- From the file menu choose compressed library
- Choose whether you want file attachments included and whether you want your entire library or just a section of it saved.

## 6. Manually Adding References

Click on the **New Reference** button  on the library toolbar. You will now see a **New Reference Window**:

- Use the Enter key to create a new line in a field, e.g. for another author.
- Use the Tab key to move down the fields.
- Use the Shift+Tab keys to move back up the fields.

The **Reference Type** box is at the top of every new reference, indicating the type of reference being entered. Journal Article is the default reference type, but you can select any other type from the drop-down list. Different fields appear for different reference types.



### Author

There are several ways to enter author (or editor) names, either:

**First Middle Last** e.g. D H Erwin

OR

**Last, First Middle** e.g. Erwin, D H

- Only one author name can be entered per line. Press **Enter** to get another line.
- If you are entering initials instead of full names, make sure there is a space between each initial.

- If your author is a corporate body e.g. Auckland Council you must put a comma after the last part of the author name e.g. **Auckland Council**, without the comma EndNote will interpret this author as Council, A.

#### Title

- Enter the title only - do not add a full-stop at the end.

#### Year

- Do not add extra punctuation such as brackets.

#### Pages

- Add pages in this format 123-35 or as 123-135.

Once all data has been entered close the reference window (**CTRL+W**). EndNote will automatically save the information when the window is closed. The new reference will now display in your library. If you need to make changes to a reference after you have closed it, open the reference, make the changes, close the window and click **yes** in the pop-up box to save the changes.

When you have finished typing the data for your reference, it should look like this. Note: You will have different fields to fill in for different reference types.

**New Reference**

Reference Type: Journal Article

Author  
Jones, S  
Brown, A

Year  
2007

Title  
Communication in the workplace

Journal  
Journal of Organisational Behaviour

Volume  
33

Issue  
4

**Pages**  
33-45

Start Page

## 7. Editing References in EndNote

In the library window, double-click on one of the references that you have entered. This will open it for editing.

You can change or delete anything or add additional information for your own use in any of the empty fields (e.g. Notes, Research Notes, url).

Close the reference (**Ctrl+W**) when you have finished editing and this will save the changes. Clicking on the **X** button in the top right-hand corner of the New Reference window will also close the reference (but be careful not to close the whole EndNote library by clicking on the larger **X**.)

If you want to delete a reference from your library, click on it once in the library window to select it, and then either hit the delete key or go to the **References** option on the menu bar, and select **Move References to Trash**. Note the deleted reference will stay in the Trash folder until you close the EndNote Library and select **Yes** to emptying your trash folder.

## 8. Importing References from Library Databases

You can search for references using University of Auckland Library databases, and import these references into EndNote. This is usually quicker and more accurate than typing them in manually.

Direct exporting is the quickest and easiest method for getting references from a database into EndNote. Not all databases offer a direct export option and the databases which do offer direct export all do it slightly differently. To find out if a database supports direct export and to get instructions check the information on the database Connect Page.

**NOTE:** Always carefully check the records you have exported from databases into EndNote as there may well be inaccuracies and some records will need editing after import.

The following demonstrates direct exporting from Business Source Premier

1. Open the Business Source Premier database
2. Search for **business ethics** in title and restrict to **Scholarly (Peer Reviewed) Journals**

The screenshot shows the EBSCOhost search interface. At the top, there are navigation tabs: 'New Search', 'Publications', 'Company Profiles', 'Thesaurus', and 'More'. A 'Sign In to My EBSCOhost' link and a 'Folder' icon are also visible. The search area includes a search box with 'business ethics' entered, and a dropdown menu set to 'TI Title'. Below the search box are two 'and' operators with empty search boxes and dropdown menus for field selection. A 'Search' button and a 'Clear' button are to the right. Below the search area are links for 'Basic Search', 'Advanced Search', 'Visual Search', 'Search History/Alerts', and 'Preferences'. The 'Search Options' section has three radio buttons for search modes: 'Boolean/Phrase', 'Find all my search terms' (selected), 'Find any of my search terms', and 'SmartText Searching Hint'. There are also checkboxes for 'Apply related words' and 'Also search within the full text of the articles'. The 'Limit your results' section has checkboxes for 'Full Text', 'Publication Title', and 'Scholarly (Peer Reviewed) Journals' (checked). There are also fields for 'References Available', 'Date Published' (Month, Year, to, Month), and 'Publication Type' (All, Academic Journal, Dissertation).

3. From the search results which appear add one or more to the **folder**

Searching: **Business Source Premier** | [Choose Databases >](#)

"business ethics" in TI Title **Search** **Clear** ?

AND [ ] in Select a Field (optional)

AND [ ] in Select a Field (optional) [Add Row](#)

[Basic Search](#) | [Advanced Search](#) | [Visual Search](#) | [Search History](#)

Page: 1 2 3 4 5 [Next](#)

1220 Results for...

**Refine your results**

Full Text

References Available

Scholarly (Peer Reviewed) Journals

1. **REFLECTIONS ON THE BUSINESS ETHICS FIELD AND BUSINESS ETHICS QUARTERLY.**

By: Carroll, Archie B.. **Business Ethics Quarterly**, Oct2010, Vol. 20 Issue 4, p715-717, 3p

In this article the author discusses aspects of business ethics and the social responsibility of corporations. The article was written

Subjects: BUSINESS ethics; MANAGEMENT; SOCIAL responsibility of business; BUSINESS Ethics Quarterly (Periodical); MORAL & e

Database: Business Source Premier

[Add to folder](#) | Relevancy: ■■■■■■■■

4. Click on the Folder icon at the top right of the screen

[Sign In to My EBSCOhost](#) | **Folder** | [New Features!](#) | [Help](#)

5. Select the item(s) you wish to export and click on the export icon



6. Click on 'save' and open the relevant EndNote library.

7. The references are exported automatically.

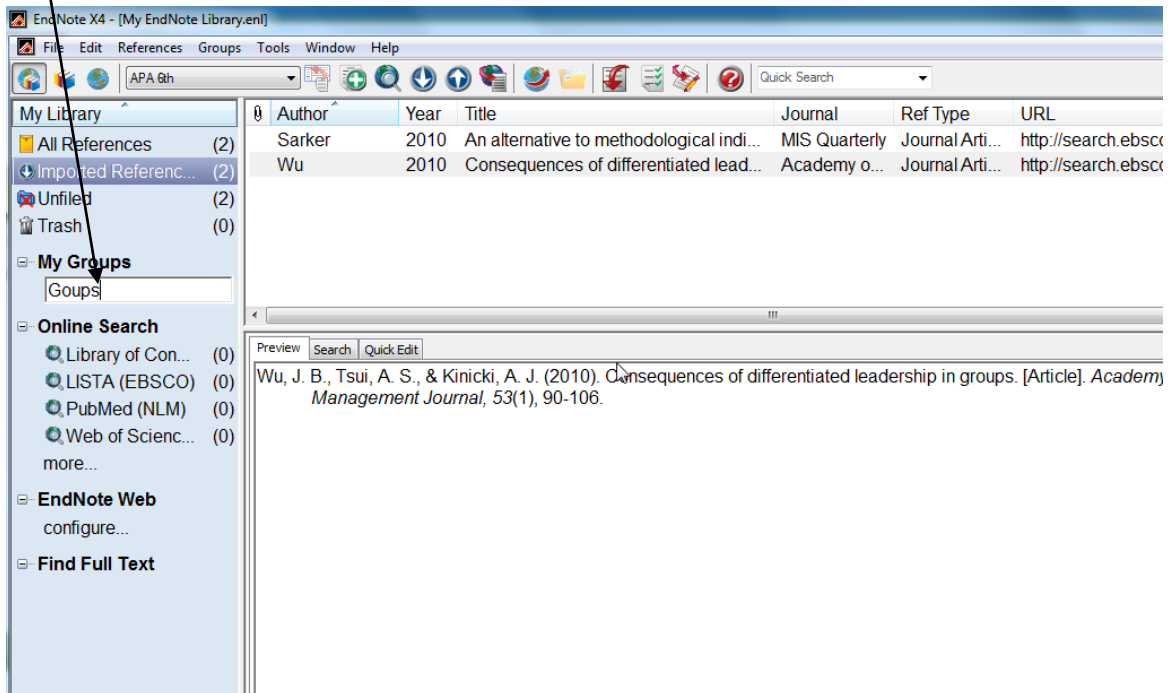
8. Check the reference has imported correctly. Sometimes you may need to edit some of the information, such as de-capitalising the article title.

## 9. Using groups

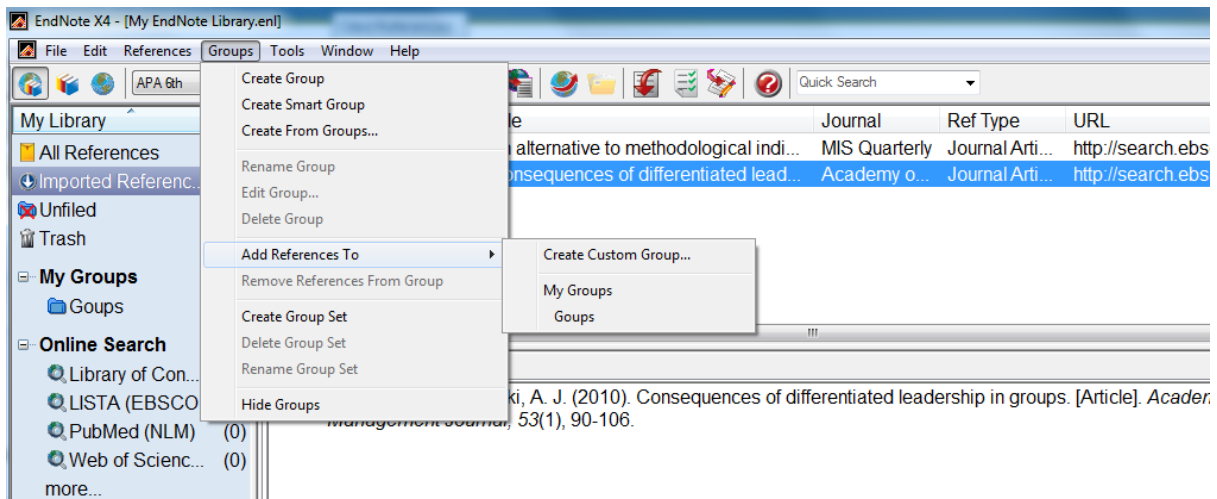
Rather than having separate libraries for separate topics which is **NOT** recommended, you can group references within the one library by subject.

To set up a group, click on **Groups** on the top menu bar, and select **Create Group** from the drop-down menu. This will open a box in the **Groups Pane** on the left-hand side of the library window, where you can type a name for the group.

## New group



To add a reference to a group, highlight the reference in the library window. Click on **Groups** on the top menu bar, click on **Add References To** from the drop-down menu, and then select the name of the group.



### More on groups

- Another way of adding references to a group is by right-clicking on the reference and selecting the group. Or drag-and-drop the reference(s) onto the group name.
- You can organise your groups into group sets which adds another level of organisation.
- You can set up Smart groups which have a search filter. When a new reference is added to your library, it is checked against the search query. If it matches, it is automatically added to the smart group

## 10. Searching for References in a Library

If you want to search your EndNote library for references that contain certain information you can use the search function.

- In the preview pane below your reference list, click the **Search** tab.
- Select the **Field(s)** you want to search, enter your terms and click **Search**. The relevant references will be displayed.

## 11. Adding Attachments

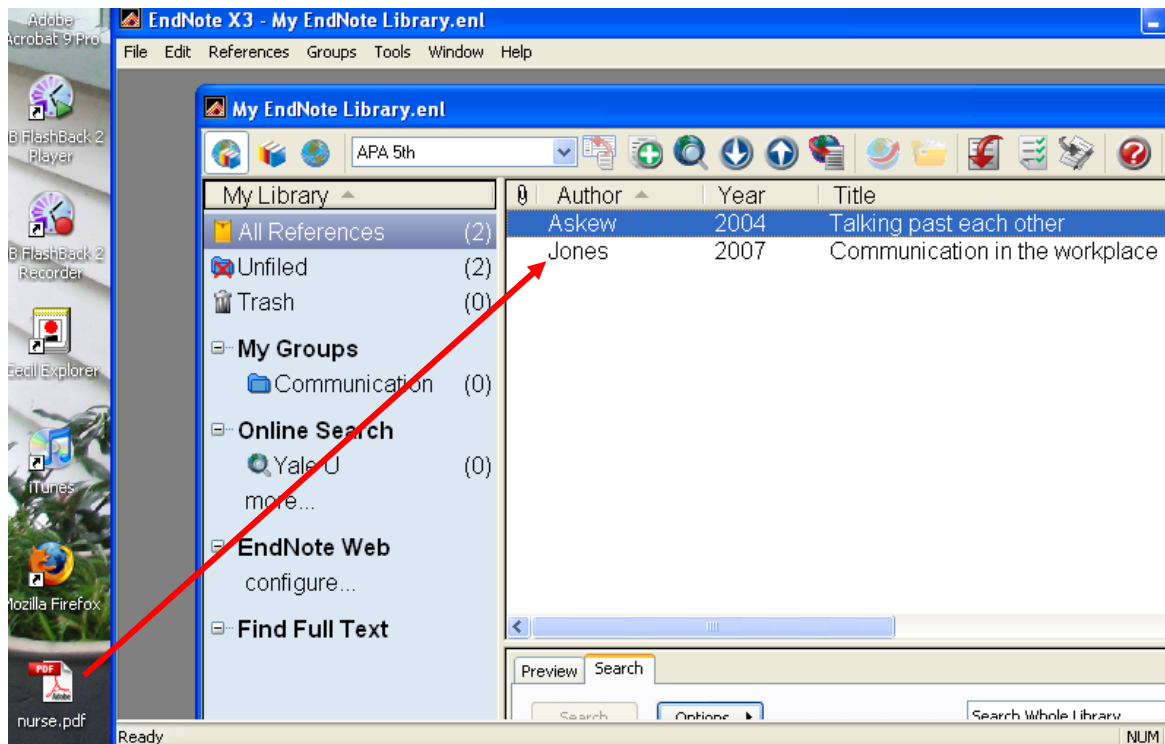
You can attach files with full-text journal articles (e.g.pdfs) in your EndNote library. This allows you to conveniently store articles and use EndNote as a file management tool as well.

There are two ways to add files to EndNote records.

1. Drag-and-drop the file into the relevant EndNote reference  
or
- 2.. References >> File Attachments >> Attach File

### Attaching Files using Drag-and-drop

Select the reference in EndNote, and drag the file from the desktop to the reference.





## Notes

### Research Notes

### URL

### File Attachments



nurse.pdf

### Author Address

After you have added the file, there will be an icon in the File Attachments field in the record, as well as on your library window.

## 12. Finding Full Text

There is a Find Full Text facility in EndNote X4 but it only works with a narrow range of databases. It will work with Science Direct which does contain a range of business material so may be worth trying.

Select the reference for which you want to find full-text (or hold down the "Ctrl" key to select multiple references).

From the **References** menu, select **Find Full Text**, or if you have a reference open for editing, use the right-click on your mouse and select **Find Full Text** from the menu.

## 13. Using Online Search

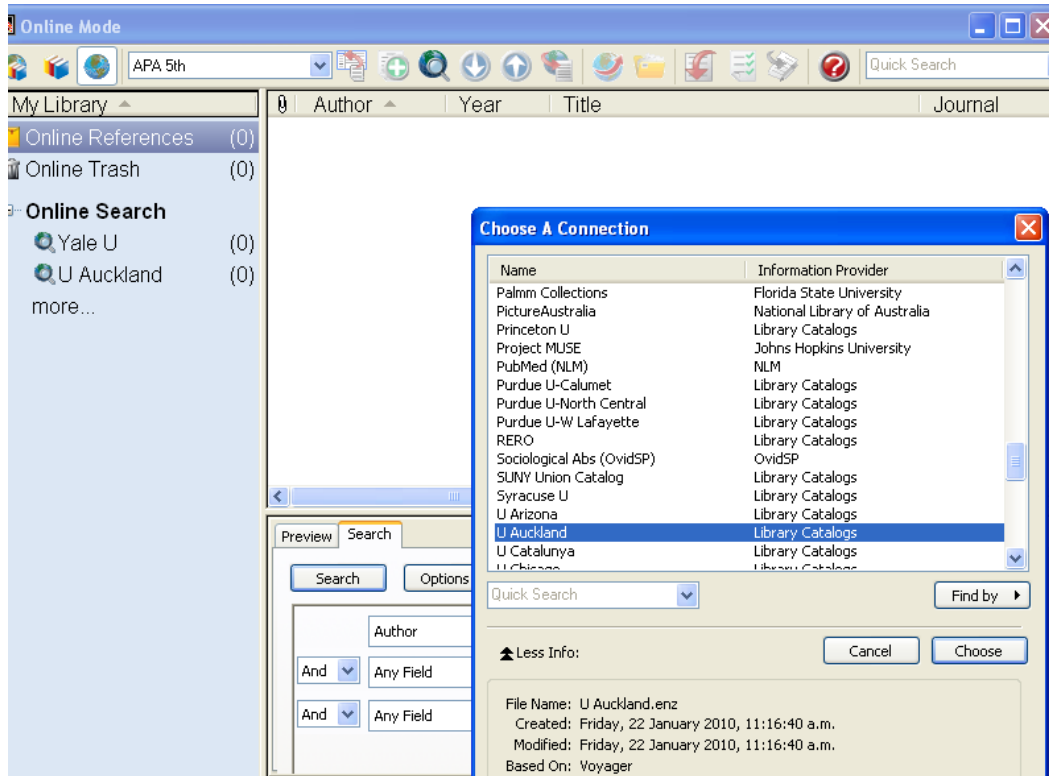
In some cases you can search a database over the Internet without leaving EndNote. You can then select references from the database and import them directly into your EndNote library. This can be useful for library catalogs including the University of Auckland library but it's not recommended for journal databases.

Not all databases can be searched using a connection file, it depends on the way the database works.

In the top left-hand corner of your EndNote library window, click on the **Online Search Mode** button.

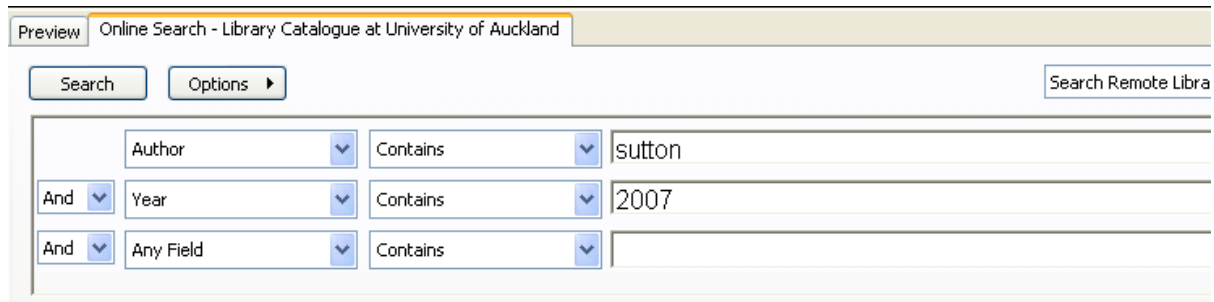


Click on **More...** under the **Online Search** function on the library toolbar. A list of available connection files will appear.

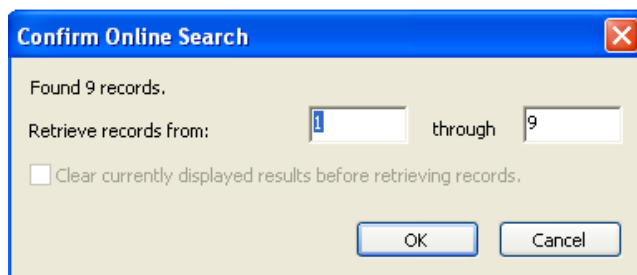


Highlight the Connection file you want to use, then click the **Choose** button, and EndNote will use your Internet connection to access the database.


When the connection to the database is successfully established, EndNote opens an **Online Search** dialogue in the **Tab Pane** of the library window.



Enter your search terms, click on the **Search** button and you will see a dialogue box stating the number of references which match your search:



Click on the **OK** button and the references will be displayed. Select the references that you would like to transfer to your library by holding down the **Ctrl** key and clicking on the required references. Click

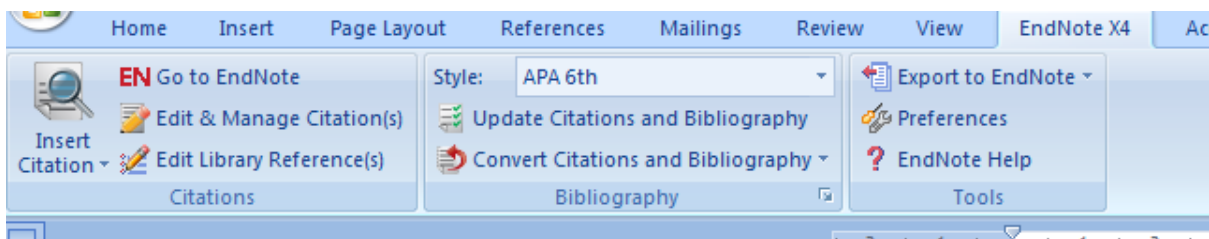
on the Copy to Local Library button  on the library toolbar. The references will be transferred to your library.

When you have finished searching, click on the **Local Library Mode** button to return to your library.



## 14. EndNote and Microsoft Word

When you install the EndNote software extra files will be inserted into your Word software. Open Word, and you will see an **EndNote** tab on the ribbon. Click on the EndNote tab to see the EndNote tools .



Open your Word document. Select the output style by using the drop down arrow in the Style window. The University of Auckland Business School currently uses APA 6<sup>th</sup> edition.


If you do not see the style you want listed, choose **Select Another Style** to browse for the style you want. Click **OK** to add that style to the toolbar

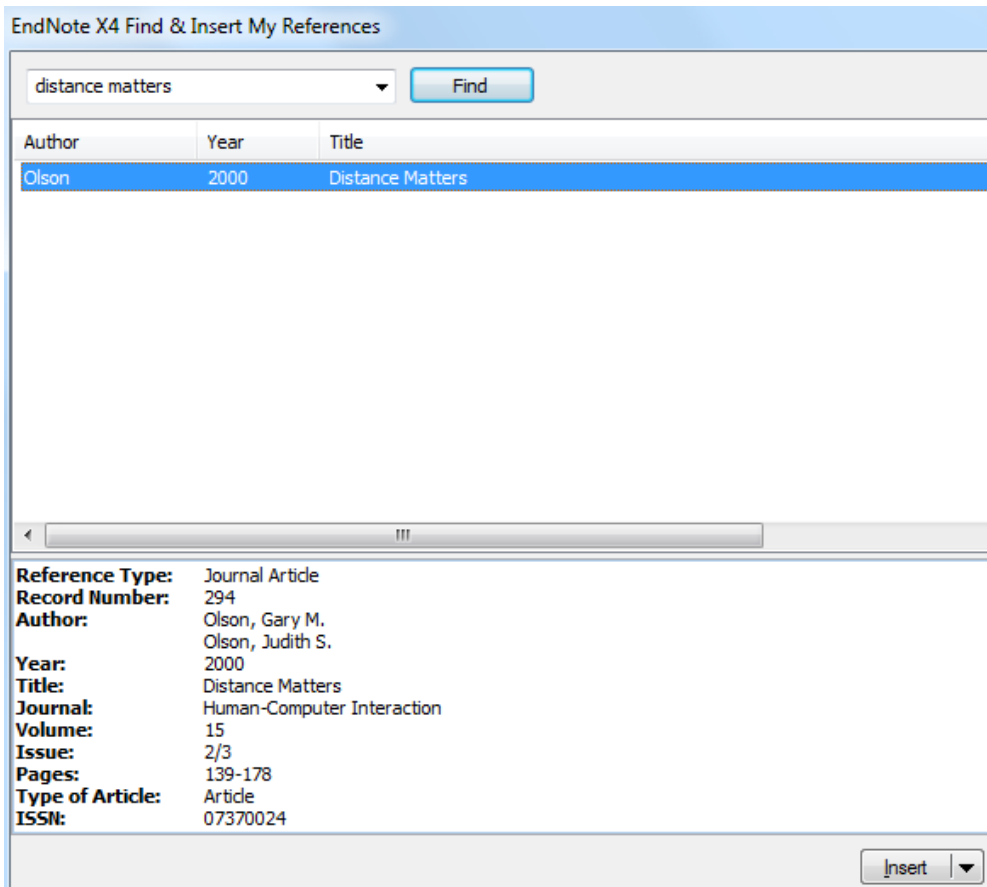
If you still do not see the style you want, check out the EndNote website at <http://www.endnote.com/support/enstyles.asp> for additional output styles.

## 15. Inserting References

In your document, go to the end of the first sentence, and insert a space before the full stop.



Click on the **Insert Citation** button  on the EndNote add-in ribbon. This opens a search window. Search for a relevant reference from your library



Highlight the reference(s) you want to insert into your document and click **Insert**.

EndNote will instantly format the citation in the text and produce a list of references at the end of the document in the style which is currently selected.

**NOTE:** If you do not have Instant Formatting enabled then you may see a temporary reference which may look something like {Askew, 2004 #198}. To enable "Instant Formatting" go to the middle section of the Endnote ribbon, click the bottom corner arrow next to Bibliography. Click the **Instant Formatting** tab, click **Turn On** and click **OK**.

## 16. Editing / Removing a citation in a formatted document

Click on the in-text citation to highlight it:

In your document under the EndNote X4 tab menu, in the Citations group, select **Edit & Manage Citation(s)**.

- To remove a citation, from the **Edit Reference** drop-down menu select **Remove citation** and then click OK.
- To remove the author or year in the in-text citations, check the box next to Exclude author or Exclude year and then click OK.
- In your document under the EndNote X4 tab menu, in the Bibliography group, select **Update Citations and Bibliography** to implement the changes.