

Getting Started with EndNote X3 - a brief guide

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 EndNoteX3. For more information the **help screens** in EndNote are very useful. These can be accessed by clicking on the **Help** option on the menu toolbar or the **Help** icon on the library toolbar.

1. Installing EndNote

Full instructions for installing Endnote from the CD are available from:

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

This web page also includes information on common installation 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 . (**Start > Programs > EndNote > EndNote Program**). 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.

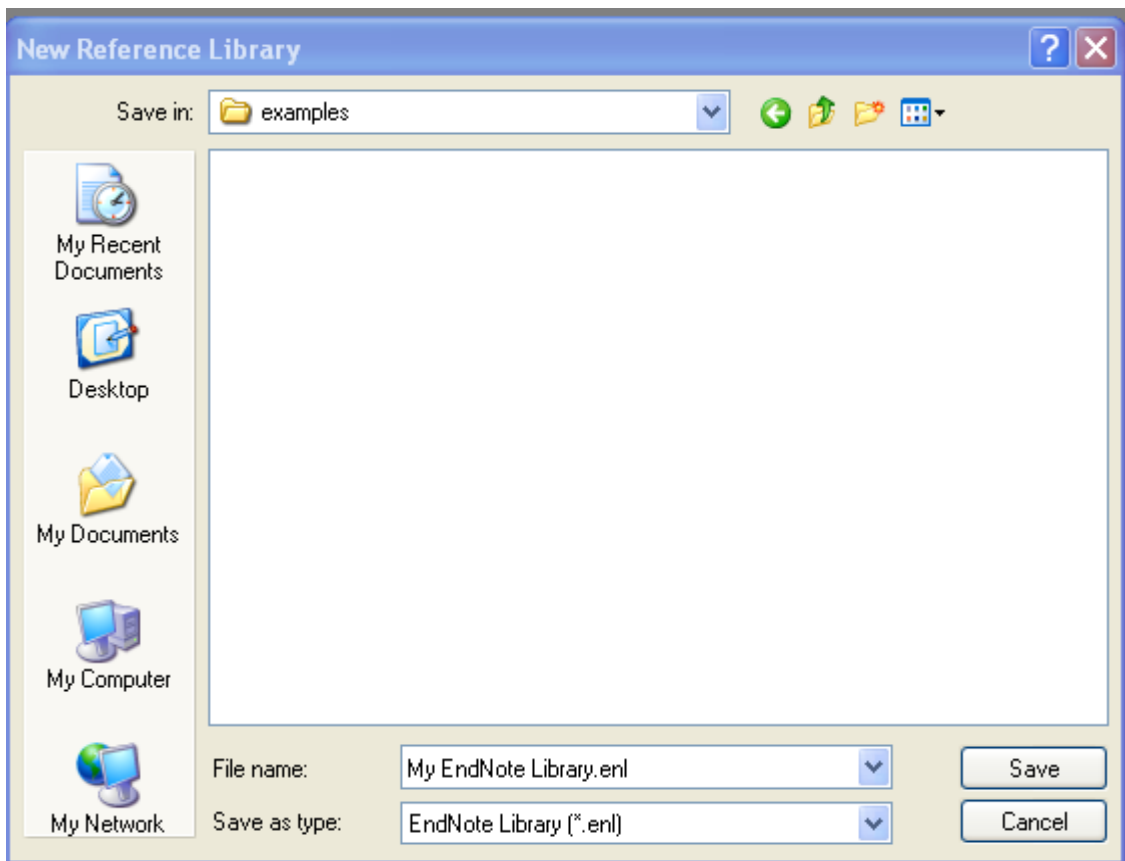
Although you can create as many libraries as you want it's generally recommended that you maintain only one. All your references can be stored in the one library and labelled or grouped to reflect any particular subject interest.

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

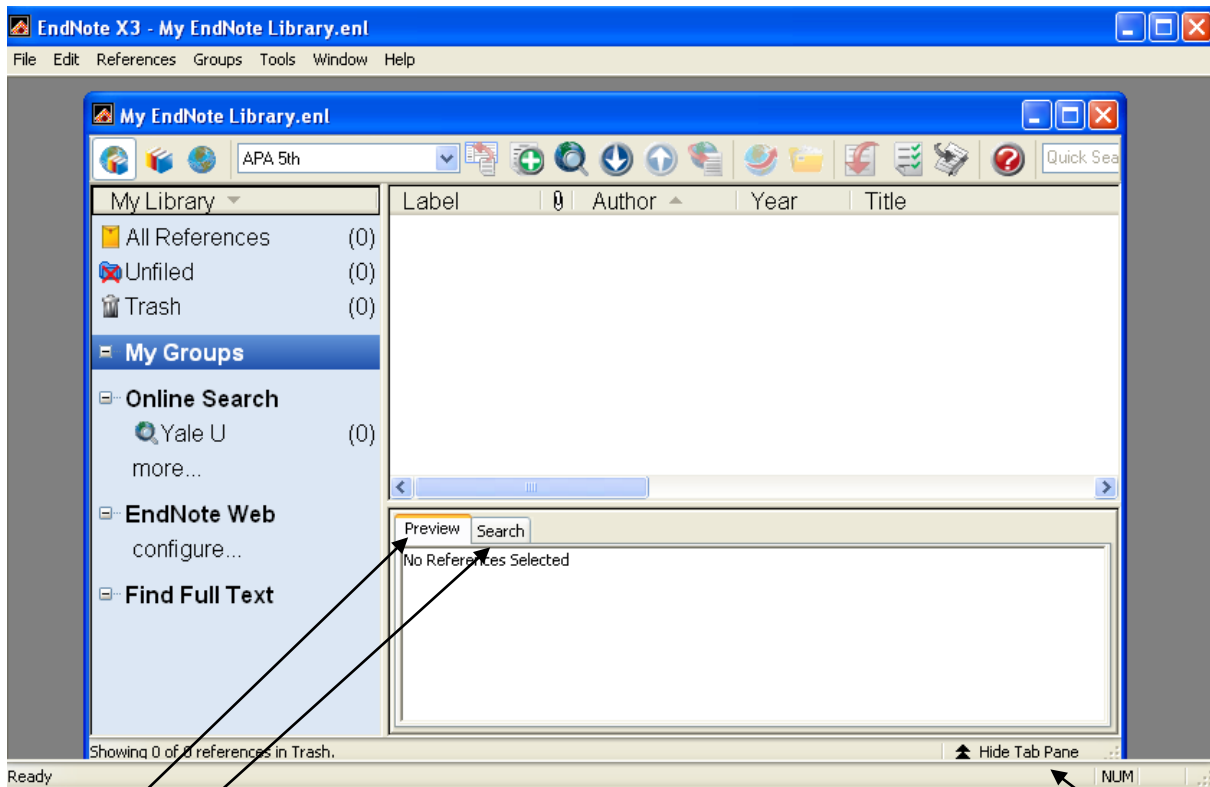
4. Creating a new library

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. To close both the 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 EndNote Library if it is lost or damaged.

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

OR

Save a compressed copy

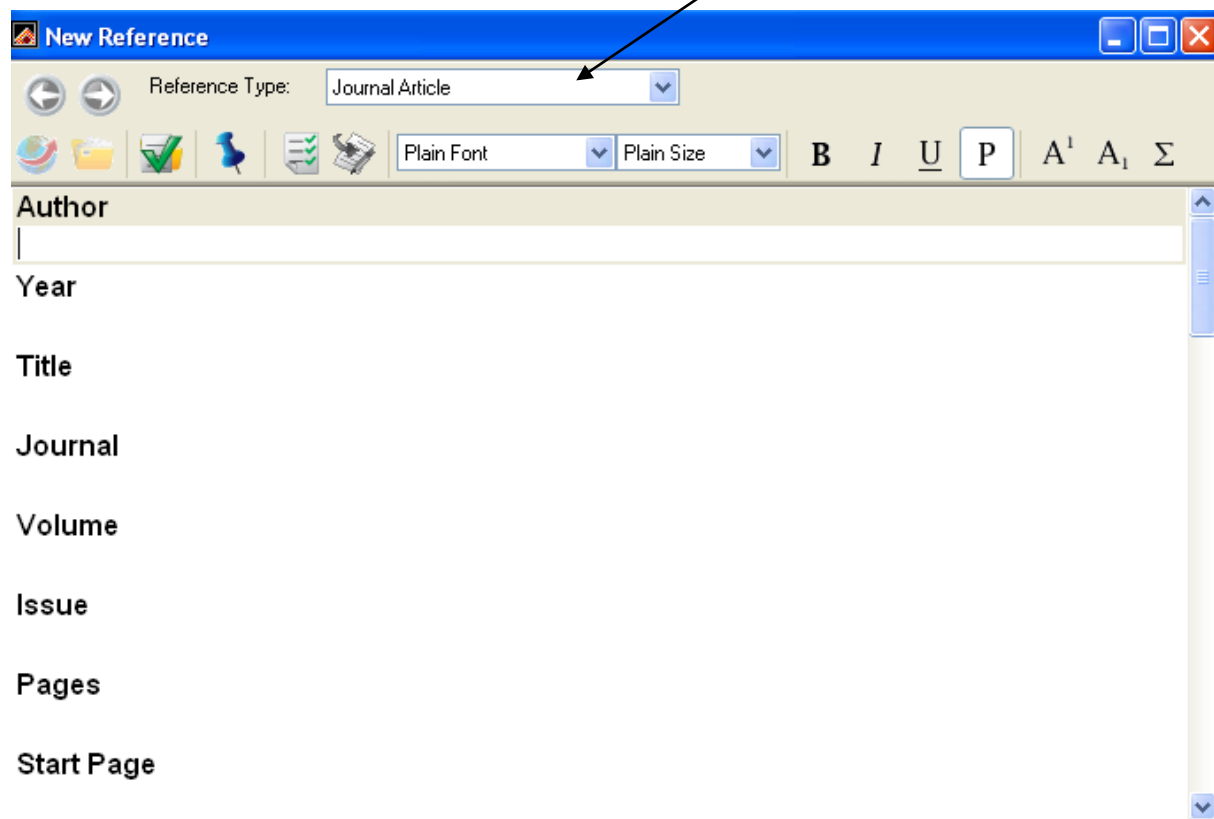
- From the **File** menu choose **Compressed Library (.enlx)**
- Choose whether you want file attachments included and whether you want your entire library or just a section of it saved.

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 a second 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 usually the default reference type, but you can select any other type from the drop-down list. Different fields will 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. Manukau City Council you must put a comma after the last part of the author name e.g. **Manukau City Council**, Without the comma EndNote will interpret this author as Council, M C

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 by highlighting and double-clicking it, 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 a bit like this.

New Reference

Reference Type: Journal Article

Plain Font Plain Size **B** *I* U **P** A¹ A₁ Σ

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**.

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.

Eg: Here's the database Connect page for Business Source Premier – scroll down to get the EndNote instructions

http://www.library.auckland.ac.nz/databases/learn_database/public.asp?record=bsp



NOTE: Always carefully check the records you have exported from databases into EndNote as there may 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 EBSCO Business Source Premier search interface. At the top, there is a navigation bar with links for 'New Search', 'Publications', 'Company Profiles', 'Thesaurus', and 'More'. On the right, there are links for 'Sign In to My EBSCOhost' and 'Folder'. The main search area is titled 'Searching: Business Source Premier' and includes a search box with the text 'business ethics', a dropdown menu set to 'TI Title', and buttons for 'Search' and 'Clear'. Below the search box are two 'and' operators with dropdown menus for selecting additional search fields. The 'Search Options' section is visible, with 'Search modes' set to 'Find all my search terms'. The 'Limit your results' section is also visible, with 'Scholarly (Peer Reviewed) Journals' selected. The 'References Available' section is partially visible, showing 'Date Published' and 'Publication Type' filters.

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

All Results: 1-10 of 1299 Page: 1 [2](#) [3](#) [4](#) [5](#) [Next](#) Sort by: Date   [Add \(1-10\)](#)

 Results for: TI business ethics  Options set [Alert / Save / Share »](#)

● Search Results: Find all my search terms 

1. [What can Psychology Tell us About Business Ethics?](#) 

By: Messick, David. Journal of *Business Ethics*, Sep2009 Supplement 1, Vol. 89, p73-80, 8p, 1 chart; DOI: 10.1007/s10551-008-9906-x; (AN 38593074)

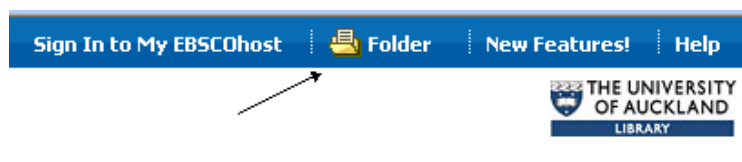
 [PDF Full Text](#)

 [Add to folder](#)

[Cited References: \(10\)](#)

[Find Full Text](#)

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



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.

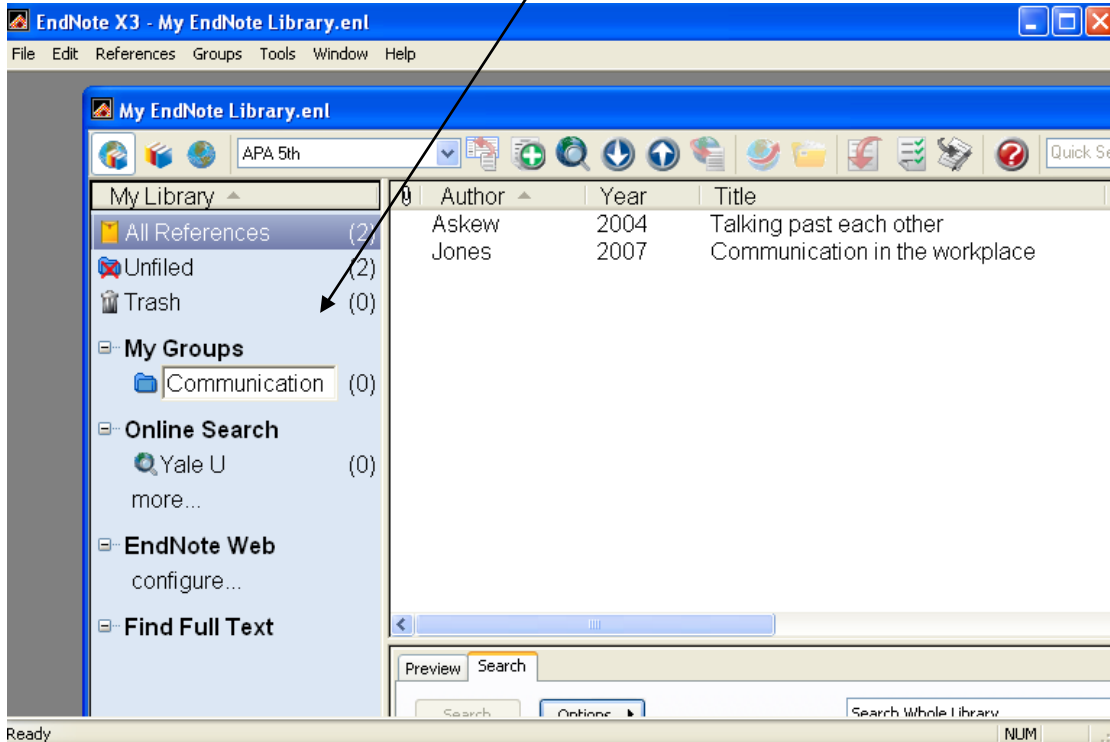
7. The references are exported automatically. These references will display in a new window, called Imported References, allowing you to check each reference for accuracy, and to edit or add your own notes. To show your complete EndNote library again, including the newly imported references, click on **All References**.

9. Using groups

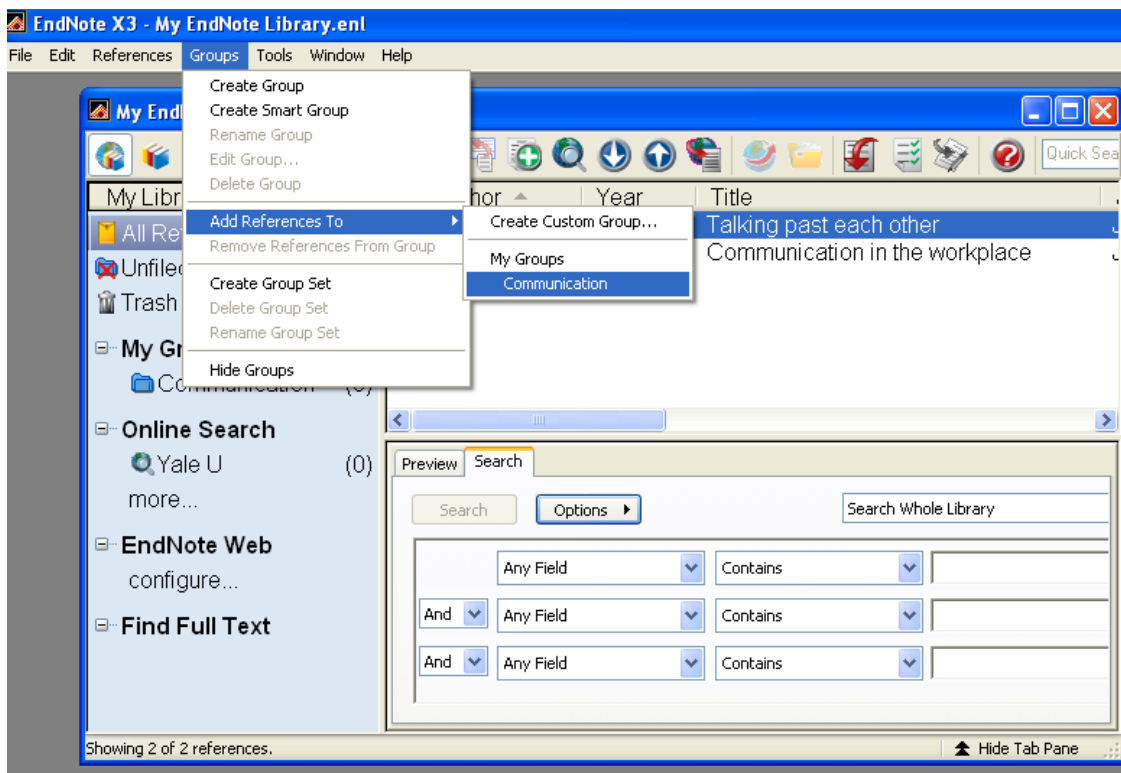
Rather than having separate EndNote libraries for separate topics which is **NOT** recommended, you can group references within the one library by subject.

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 add 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

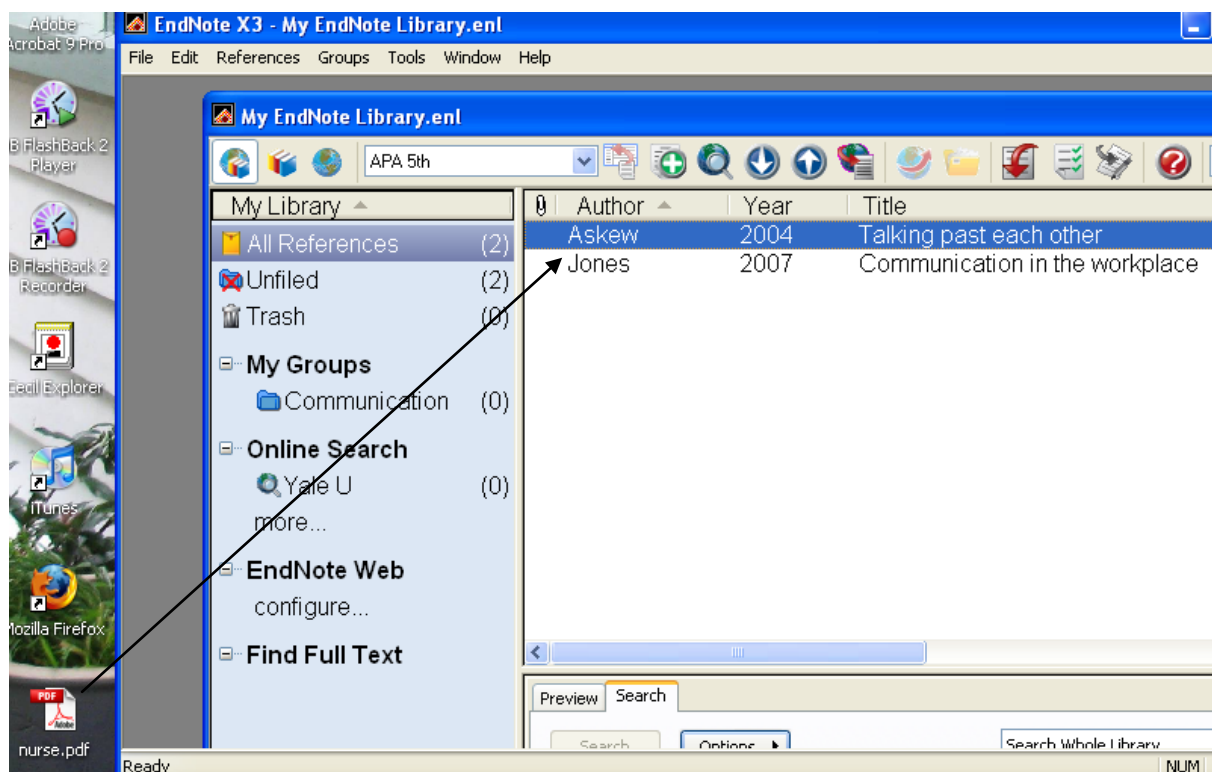
You can attach files with full-text journal articles (e.g.pdfs) in your EndNote library. This allows you to conveniently store articles and use EndNote as a file management tool as well.

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



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 X3 but it only works with a narrow range of databases, which does not include the major business databases such as ABI/Inform and Business Source Premier. It will, however, work with Science Direct which does contain a range of business material so may be worth trying out.

In your EndNote library 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.



Alternatively use the Find Full Text icon on the toolbar


13. Using Online Search

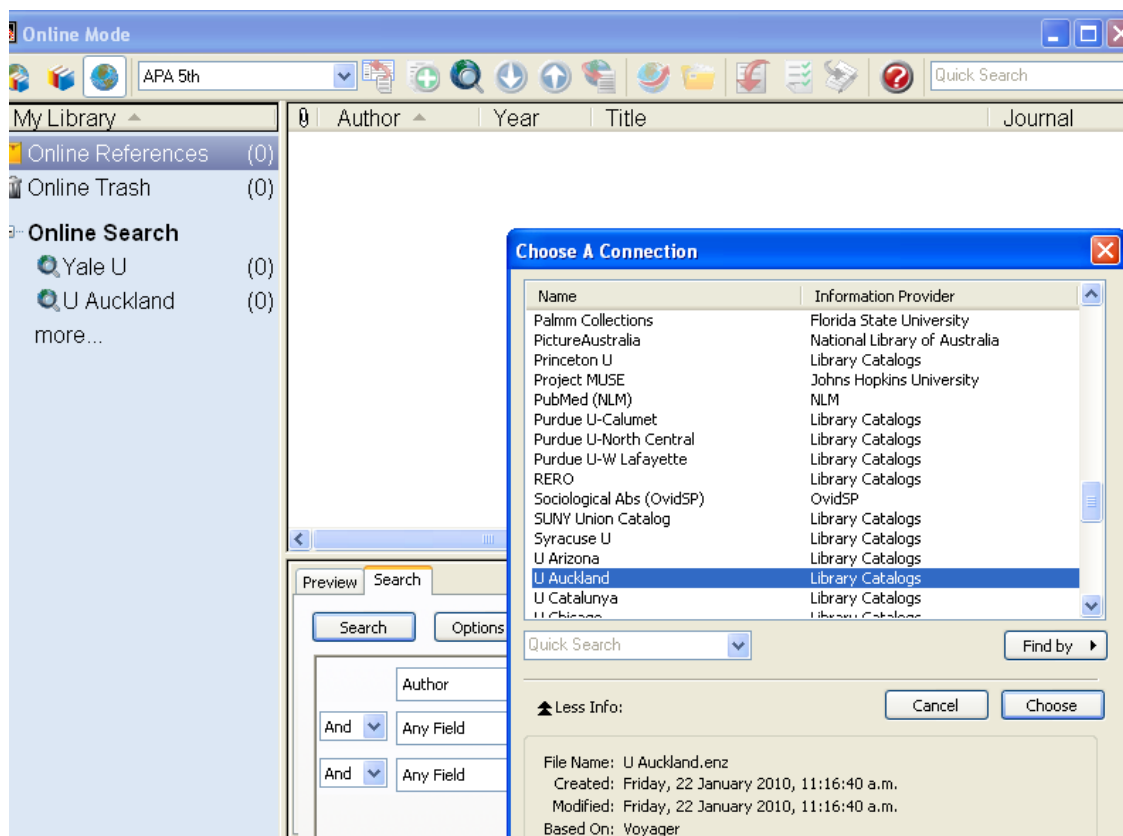
In some cases you can search a database over the Internet without leaving EndNote. You can then select references from the database and import them directly into your EndNote library. This can be useful for library catalogs including the University of Auckland library but it's not recommended for journal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

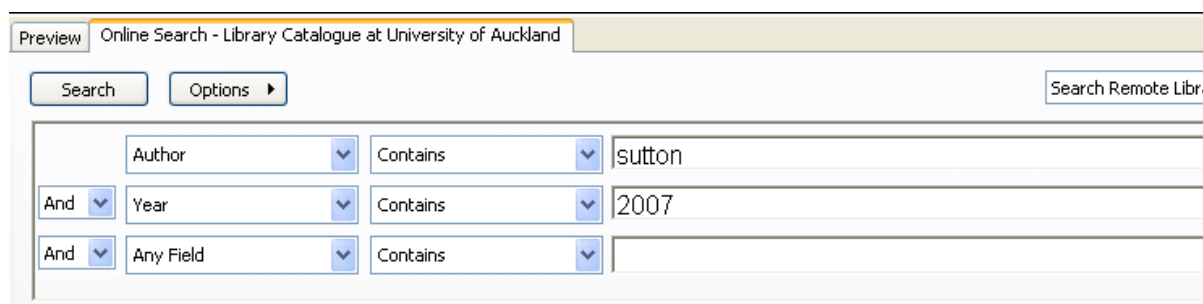


Click on the **Online Search** button  on the library toolbar. A list of available connection files will appear.

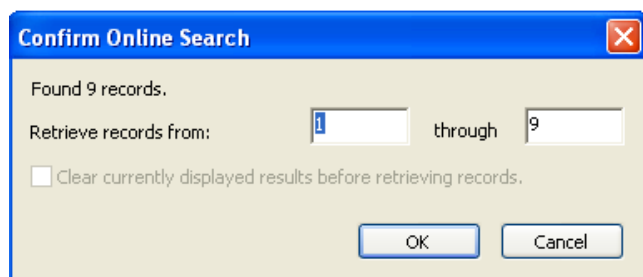


Highlight the Connection file you want to use, then click the **Choose** button, and EndNote will use your Internet connection to access the database. (You need to be connected for this to work).

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.

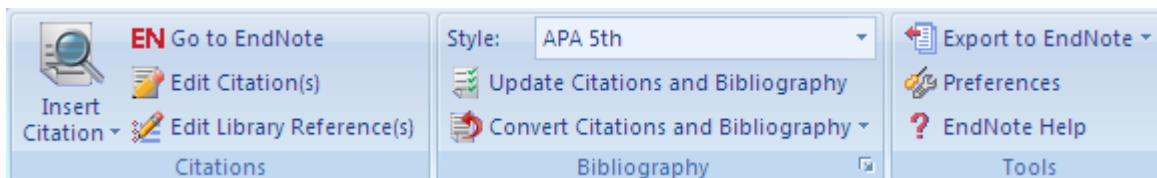
Click on the Copy to Local Library button  on the library toolbar. The references will be transferred to your library.

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 2007, and you will see an **EndNote X3** tab on the ribbon. Click on the EndNote X3 tab to see the EndNote tools .



Open your Word document. Select the output style by using the drop down arrow in the Style window. Examples of output styles are APA, MLA, Harvard. The University of Auckland Business School currently uses APA 5th or APA 6th edition


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

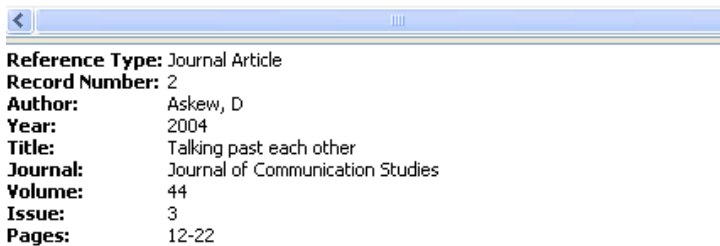
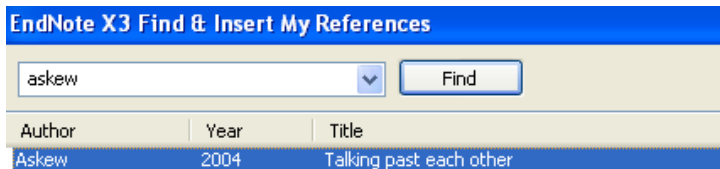
If you still do not see the style you want, check out the EndNote website at <http://www.endnote.com/support/enstyles.asp> for additional output styles.

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 X3 tab menu, in the Citations group, select **Edit Citation(s)**.

- To remove a citation, click the Remove button 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 X3 tab menu, in the Bibliography group, select **Update Citations and Bibliography** to implement the changes.