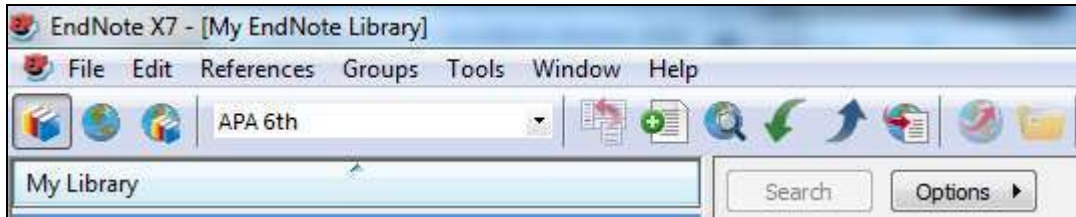


# EndNote X7 (Word 2013)



## 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
- Create a bibliography from EndNote

## Need more help with EndNote?

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

December 2013

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# PART ONE

## What is EndNote?

EndNote is a specialised database program for storing and managing bibliographic references. It allows you to copy references from Library catalogues and bibliographic databases. You can add your own notes, rankings, subject headings, and useful quotations 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.

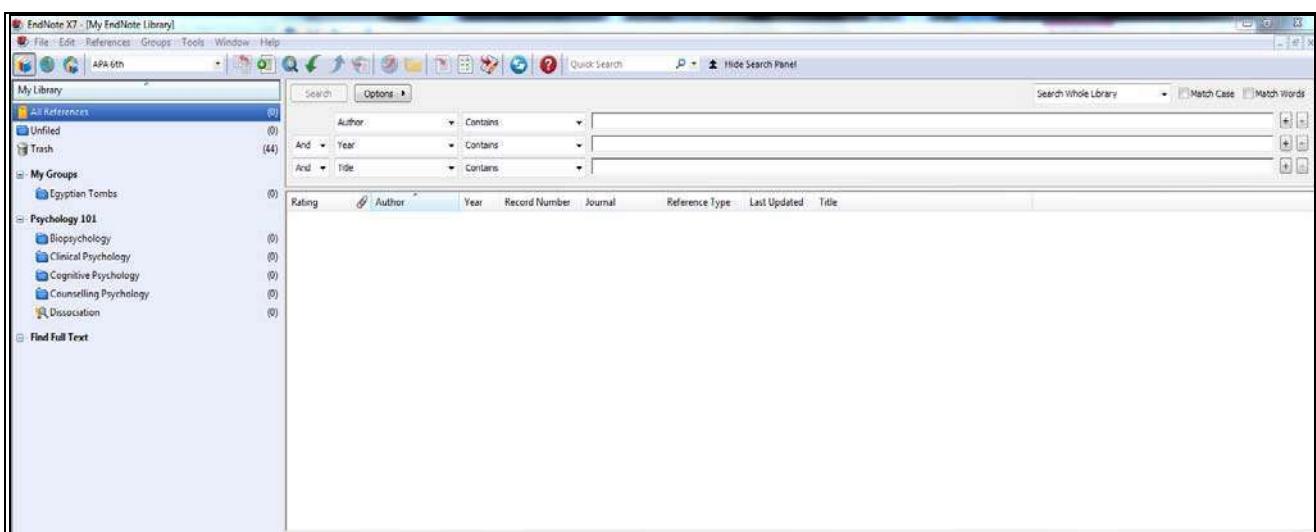
## EndNote Library

### EndNote Terminology

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.

To create a new library:

1. Open the EndNote programme from the menu:  
**Start >> Programs >> EndNote >> EndNote Program** (if you get a screen pop-up asking you to create an EndNote Web account – click cancel)
2. Click the image next to the option **Create a new EndNote library**. EndNote will present a dialog box to name and save the file.
3. Enter a name for your new library in the **File name** area.
4. Click **Save**. In this tutorial your library should be saved to the Desktop.
5. The new file is an empty EndNote library, showing “0 out of 0 references.”



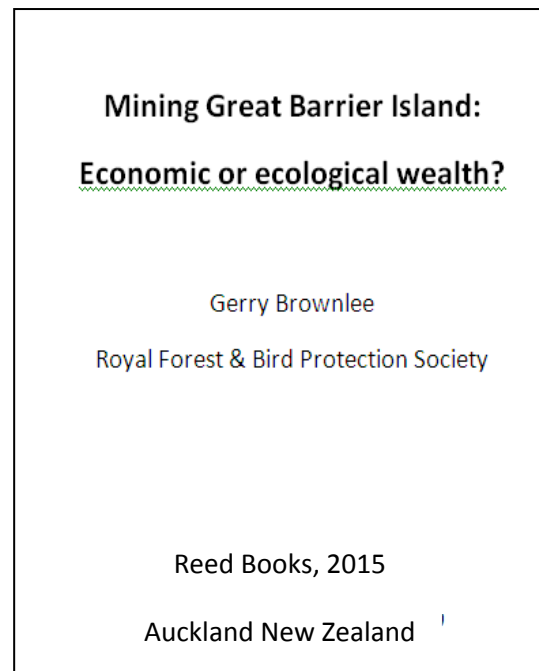
## One Library

While it is possible to keep more than one library, it is recommended that you **only have one library**. If you insert references from different libraries into the same Word document there can be problems with formatting and reference double-ups. You can use the groups, notes and search features of EndNote to effectively manage a large library. Some fields in a reference can have about 10-12 pages of text, e.g. you can have 10 pages of your own research notes in addition to all the other information about the reference.

## Manually Enter a Reference

To input reference information manually:

1. **References >> New Reference**
2. A blank **New Reference** appears.
3. Choose the Reference Type from the drop-down box
4. **Enter** the reference from this sample cover page:



EndNote X7 - [New Reference]

File Edit References Groups Tools Window Help

Reference Attached PDFs

Plain Font Plain Size **B** *I* U **P** A<sup>1</sup> A<sub>1</sub> Σ Aa

Reference Type: Book

Rating  
Author  
Year  
Title  
Series Editor  
Series Title  
Place Published  
Publisher

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.

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.

Once all data has been entered close the reference window (CTRL+W). EndNote will ask if you want to save the information, click yes. 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.

### Names

- 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**, If you omit the comma then EndNote will interpret this as an individual author and output it as e.g. Council, M.C.
- As you enter author names you may notice that some appear in red. Any text that appears in red is part of a term list. These are used to help with data entry by suggesting terms as you type.
- For further information on entering names, including authors with suffixes and corporate authors that already include a comma in their name, consult Chapter 4 of the full EndNote manual: <http://endnote.com/if/online-user-manual/x7>

### Formatting Text in a single EndNote Reference

The general rule is that you do not format your references with bold, italics, underlining or punctuation. EndNote does all of that formatting automatically. The reference style you select for your document governs the style of in-text citations and bibliography.

There are some occasions, eg; entering scientific names - Southern royal albatrosses (*Diomedea epomophora*), where you may need to format a piece of text. In these situations you can use the formatting options at the top of the reference window.

## Accessing Records from the Catalogue

There are two ways to get results from the Library Catalogue into Endnote:

### Option 1: Use the Online Search Method (searching within Endnote)

Currently the most reliable method of getting results from the Library Catalogue into EndNote is to use the Online Search method.

Before starting any Online Search make sure your library is displaying in the **Online Mode**. To select the Online Mode click on the picture of the globe at the top left of the library window.



### Step 1: Search for References

1. **Tools >> Online Search**
2. Select **U Auckland** from the list of connection files and click **Choose**.

EndNote has now established a link into the Library Catalogue and the EndNote search tab will show 'Search Remote Library'.

3. Enter the search term e.g. **egyptian tombs** into the first search box
4. Change the **Author** option to **Any Field** and click **Search**.
5. EndNote will search the Library Catalogue and display the references that match your search term.

### Step 2: Retrieve References

1. You will now be given the option to retrieve the references.
2. Retrieve all the references from the search by clicking **OK**. The references will be downloaded and will appear in the Retrieved References window.

*NB: If your result set is too large you can choose just to retrieve a section of the results OR click **Cancel** to return to the search screen and add further terms to your search.*

### Step 3: Save References

1. Review the retrieved references. These references are not actually part of your EndNote library yet. If you closed EndNote now they would not be saved.
2. **Select the references** you want to save. If you want to save only a sub-set, hold down the Ctrl key and click on the individual references.
3. The selected references can be copied into your EndNote library by clicking **References >> Copy References To>>** choose your library name.

**IMPORTANT:** To view and use your EndNote Library you need to now change from **Online Mode** to **Integrated Mode**. A pop-up box will ask if you want to discard the online references, if you have finished copying references, click **OK**.

### Option 2: Export from Library Search (not recommended – please check references for accuracy after exporting)

1. Open Library Search
2. Enter the search term **coastal erosion** into the search box
3. Add the first five items on the results list to your **My Library** account
4. Go to your **My Library** account and select all items
5. Select **Push to Endnote** from the **Select How to Save** menu (\*note: these items should directly export into your Endnote account)
6. Click on **Go**

## Use Groups to Manage your References

Groups are displayed in the left column of your library. The groups: All References, Unfiled and Trash will always show. Some groups will appear only when you have used certain EndNote functions, e.g. Search Results, Copied References.

You can also create up to 500 of your own custom groups to help manage your references. Custom Groups are like folders. References are only included in a group if you add them.

### Creating a Group

1. From the **Groups** menu select **Create Group**
2. A box will appear under the **My Groups** heading. Type your group name in here e.g. egyptian tombs

### Adding References to a Group

1. In All References **select the reference(s)** you want included in the new group.
2. From the **Groups** menu select **Add References To >> egyptian tombs**

### Removing References from a Group

1. In a group select the reference(s) to be removed
2. From the Groups menu select **Remove References From Group**

### Deleting a Group

1. Click on the group name in the left column to display the group you want to delete
2. From the **Groups** menu select **Delete Group**.

You can add a single reference to more than one group. Adding a reference to a group does not remove it from your main library (All References). This means you can remove a reference from a group but it will still be included in your main library (All References). If you delete a reference from your library (All References), it will be removed from all groups and permanently deleted.

## Work with References

Each row in the main window represents a single reference. Each reference in the library contains the citation details, author, title, journal title, etc.

Re-order the list of references by clicking on the title of the column you want the references sorted by, eg: author, year.

Adjust the column widths by dragging the bar between column headings.

The screenshot shows the EndNote X7 library window. The left sidebar shows a tree view of the library structure. The main window displays a list of references with columns for Rating, Author, Year, Record Number, Journal, Reference Type, Last Updated, and Title. Two callout boxes provide instructions: one pointing to the 'Author' column header and another pointing to the vertical bar between 'Year' and 'Record Number'.

Rating	Author	Year	Record Number	Journal	Reference Type	Last Updated	Title
	El Gawad, Heba ...	2003	45		Book	2/12/2013	Sau
	Essien, Effiong	2012	48		Book	2/12/2013	Cur
	Fisher, Bob; Daw...	2003	46		Book	2/12/2013	Sau
	Fisher, Bob; Daw...	2001	49		Book	2/12/2013	Virt
	Foster, John L.	1974	50		Book	2/12/2013	Low
	Harpur, Yvonne	2001	51		Book	2/12/2013	The
	Harpur, Yvonne; ...	1987	52	Egyptian tombs...	Book	2/12/2013	Dec
	Manniche, Lise	1987	53	Studies in Eryp...	Book	2/12/2013	City
	Martin, Geoffre...	1985	54	Fifty-second e...	Book	2/12/2013	The
	Pearsall, Debor...	2008	55		Electronic Book	2/12/2013	Enc
	Snape, S. R.	2011	56	Blackwell ancie...	Book	2/12/2013	Anc
	Snape, S. R.; WIL...	2011	57	Blackwell ancie...	Electronic Book	2/12/2013	Anc

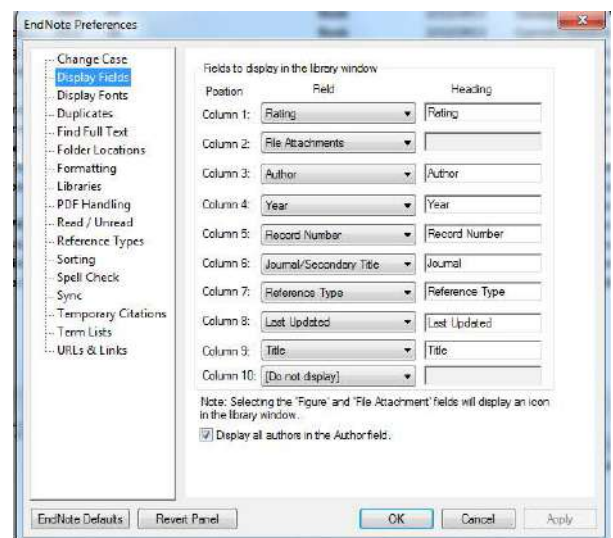
To delete a reference from your library click on the reference and then go to **References >> Move References to Trash**

### Changing the Fields Displayed in the Library Window

By default, EndNote displays the Read/Unread Status, File Attachments, Author, Year, Title, Rating, Journal/Secondary Title, Last Updated, and Ref Type for each reference. You can display up to ten fields.

To change the columns displayed in the library window:

1. From the **Edit** menu, choose **Preferences**.
2. Select **Display Fields** from the list on the left side of the preferences window.
3. Select the columns to display. By default, EndNote will use the generic field name as the column title; you may use different text as the column title by entering that text in the "Heading" text box corresponding to each column.
4. Click **OK** to confirm your selection.





## Search your Library

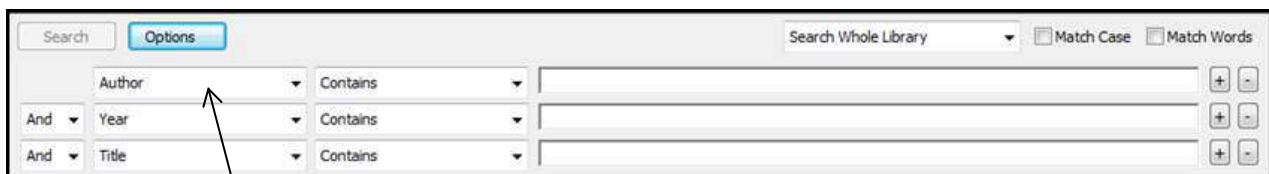
As your Library increases you will need to be able to easily search for specific references. There are two search functions available in EndNote which search across both your references and the text of any attachments you have saved within your Library.

### Quick Search


In EndNote at the end of the toolbar there is a **Quick Search** box. Enter your search word(s) in the box and press Enter. The results will be displayed. To view all references in your library again select **References >> Show All References**

### Search Tab

If you want more search options then you need to use the **Search** Tab. Above the references in your library you should see a preview pane. Choose a search option, and enter some key-words to search.



To search for text within PDFs choose the **Any Field + PDF with notes** from the drop-down menu.

 To search on word variations use the asterisk for a wildcard e.g. to search for all variations of the word free search for **free\***

## Track and Rate your References

EndNote has several options for tracking your references.

### Read or Unread Status

To change the status of references to 'read' or 'unread':

- From your library, double-click on a reference to open.
- Click the **Mark as Read/Unread icon** to change the status of your reference.

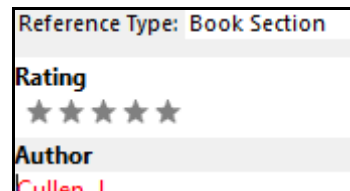


**Note:** EndNote automatically marks a reference as read when you view it in the reference window. You can change Read/Unread preferences by going to **Edit > Preferences > Read/Unread**.

## Rating your References

To rate your references:

- From your library, double-click on a reference to open.
- Apply a rating to your references in the main reference window by clicking on each star directly.



**Note:** You can search by rating by selecting the 'Rating' option from the Search Field list.

## EndNote and Microsoft Word

### Cite While You Write

The EndNote **Cite While You Write** (CWYW) functions allow you to easily and quickly cite references and create a document with properly formatted citations and bibliography. These **Cite While You Write** functions are available from the **EndNote** tab on the Microsoft Word ribbon.

### EndNote Citation Styles

Before creating your document in MS Word you need to select a reference style. Styles are used to determine the format for your citations and references. Styles are typically for specific journals, though they can also be based on more general style guides such as the Chicago Manual of Style or the MLA Handbook. EndNote provides hundreds of preconfigured styles. You should always check with your supervisor or department as to which style to use. In rare cases you may need to make minor alterations to the style you have chosen if it does not quite fit your requirements. Consult the full EndNote manual for instructions on editing a style.

## Select a Style

EndNote contains many referencing styles for you to choose from. If you are unsure which style to use, ask your lecturer, tutor or supervisor.

To choose a style:

1. **Edit >> Output Styles >> Open Style Manager**
2. The EndNote Styles box will display
3. Select the style you want by clicking in the tick-box beside it. For example we will select the **APA 6th** style. You can select more than

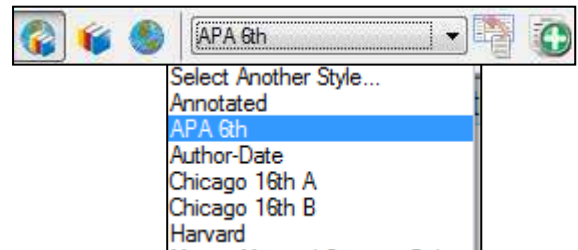


one style.

- Click on the cross to close the EndNote Styles box.

The style currently used in your EndNote library is displayed at the top of the screen. The default style is usually the **Annotated** style.

To select the style you have just chosen click on the drop-down option. Click on the style you want, e.g. **APA 6<sup>th</sup>**.



Your style is now selected and all citations and reference lists will be formatted by the rules governing the style. If you need to change the style for any reason, then simply repeat the steps above.

**Note:** If the style you want does not show in the list of options you may need to go to the EndNote website and download a style. Further information on this can be found in the full EndNote manual.

### Saving Additional Styles

If the style you want does not show in the list of options you may need to go to the EndNote website (<http://endnote.com/downloads/styles>) to download a style. Save the style file in a folder (eg: endnotex7styles) in one of the following locations :

- C:\Documents and Settings\[User Name]\My Documents\ (*for Windows XP*)
- C:\Users\[User Name]\ Documents\ (*for Windows Vista or Windows 7*).

You will need to make sure the EndNote folder locations match where you are saving the styles. In EndNote select **Edit > Preferences > Folder Locations** to check the locations.

## Insert Citations

### Inserting Citations from MS Word

In your document type the following quote:

“Residents of Great Barrier Island have mixed reactions to the possibility of mining on the island.”

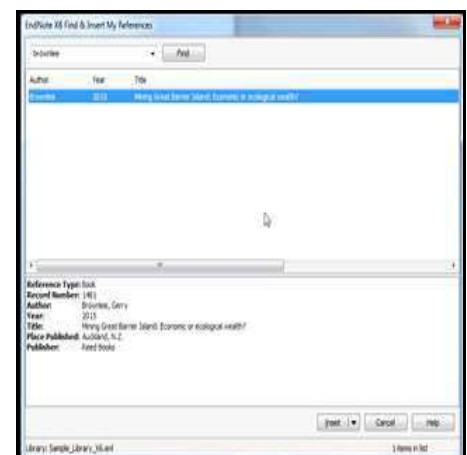
At this point we need to insert a citation for this quote. The reference we wish to insert is the Great Barrier Island reference that we entered earlier.

To insert the citation from MS Word:

- Choose the **EndNote X7 tab >> Insert Citation >> Find**



**Citation icon**



2. The EndNote Find Citations box will appear so you can search for your reference.
3. Type the author's name, e.g. Brownlee
4. Click **Find**

If you can't remember the name of the first author, you could enter in the name(s) of other authors, or keywords from the title or other relevant fields. It is also possible to select text in your MS Word document and then choose the 'Find Citation' option to find the selected text.

5. Select the appropriate reference and click **Insert** at the bottom of the box.
6. The citation should now appear in your document.

*The EndNote Find Citations dialog box will show the finds that resulted from your search.*

- *If your search resulted in more than one find, you will need to select the correct reference citation for the idea you are currently citing.*
- *If no finds were found, you will need to try again.*
- *Note that if you do not have the EndNote software (and your library) open, no finds will be generated from this procedure; ensure that both are open before attempting to find citations.*

## Inserting Citations from EndNote

1. Type another sentence in your word document. Position your cursor at the end of this sentence and type a space. At this point we wish to insert two references.
2. From Microsoft Word you use the **EndNote tab >> Go To EndNote**
3. In your EndNote library locate and select two references. (If you want to insert more than one reference at the same point in your MS Word document at the same time, hold down the CTRL key when selecting your references.)
4. **Tools >> Cite While You Write (CWYW) >> Insert Selected Citation(s)**
5. The references appear in the text and in the list that is building at the end of the document.

"Residents of Great Barrier Island have mixed reactions to the possibility of mining on the island" (Brownlee & Royal Forest & Bird Protection Society, 2015).

The environmental effects of mining can vary and are often dictated by the form of mining used. Practices to assess and mitigate the effects of mining have been developed by many researchers (Bell & Donnelly, 2006; Macleod, Rouse & Ministry of Commerce, 1991; Warhurst & International Development Research Centre (Canada) 1999).

Bell, F.G., & Donnelly, L.I. (2006). *Mining and its impact on the environment*. London, New York: Taylor and Francis.

Brownlee, G., & Royal Forest & Bird Protection Society. (2015). *Mining Great Barrier Island: Economic or ecological wealth?* Auckland, N.Z.: Reed Books.

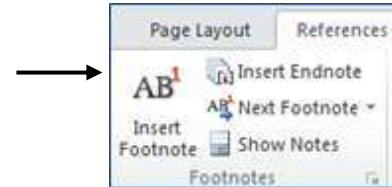
Macleod, M., Rouse, B.L., & Ministry of Commerce, Energy and Resources Division. (1991). *Guidelines for assessing the impacts of mining on the environment*. Wellington, N.Z.: Resource Allocation Section, Energy and Resources Division, Ministry of Commerce.

Warhurst, A., & International Development Research Centre (Canada). (1999). *Mining and the environment case studies from the Americas*. ix, 335p.). Available from <http://site.ebrary.com/lib/auckland/Doc?id=10176416>

## Inserting Footnotes

If you are using a footnote style, (e.g. Chicago A), you will need to insert a footnote in Microsoft Word prior to inserting references from Endnote.

1. In Word 2013, select **References > Insert Footnote**.
2. From Word, select the **EndNote Tab > Go to EndNote**.
3. Find and highlight the required reference in EndNote.
4. Back in Word: position your cursor in the note. Then go to Word's **EndNote Tab**, click **Insert Citation > Insert Selected Citation(s)**



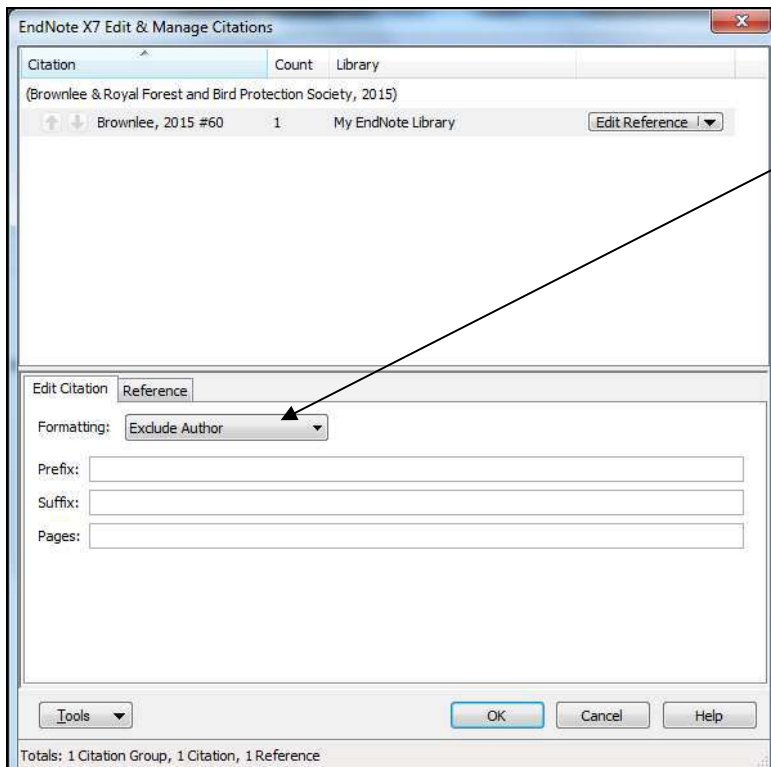
## Edit Citations

The way your citations appear in the text of your document may not always be formatted as you require. Sometimes you may need to include a prefix, suffix, or page reference, or to exclude the year or author. For example the in-text citation may be - (Nugent, 1998) - but you would prefer it too look like - (Nugent, 1998, p. 1077) or ... as reported by Nugent (1998, p.1077)

EndNote has a specific function for editing citations. You must use this function to edit citations. If you try to change citations by manually typing or deleting in the Word document the changes will not be retained. The citations will soon revert to their original form.

To make changes always follow these steps:

1. Insert the citation in the document
2. Place your cursor somewhere inside the citation to be formatted (it should turn grey)
3. From the **EndNote tab** choose **Edit and Manage Citation(s)**
4. The EndNote Edit and Manage Citation dialog box is displayed
5. All references in the document are displayed in the top part of the pane. The reference you have chosen should be selected.
6. Use the **Edit Citation** options in the Edit Citation pane to exclude the required information then click the **OK** button to confirm changes.



### Exclude author & year options

If you wish to remove the author or year from your citation, then use the formatting drop down box and select the appropriate option. Use these options when the author or year is already part of the sentence. For example:

Cadman (1997) has stated ...

### Prefix option

The prefix option allows you to add text to the beginning of your citation such as 'for example', 'as cited in' etc. When you enter your text, ensure it is entered exactly as you wish it to appear and at the end of the text include a space (otherwise there will not be a space between your prefix and the citation).

### Suffix option

The suffix option allows you to add text at the end of your citation such as page numbers. Type your text exactly as you wish it to appear, including spaces and punctuation.

To include a page number in the in-text citation, in the suffix box type the page number and the necessary punctuation, for example **p.** or **pp** and commas and full stops if required, **, p. 1077**.

### Pages option

This option allows you to specify page(s) for citations, e.g for direct quotes. This option is only reliable for 'footnote' styles. For 'author-date' type styles you can enter your page(s) into the 'suffix' field.

**Note:** to correct details in a reference click on the **Edit Reference** item next to the incorrect reference. This will take you back to your Endnote Library where you can open the reference and correct it. Then close the reference to save the changes. To update the changes in your Library select **Update from My Library** using the Edit Reference drop down box.

## Back-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. When backing up it is essential that you keep copies of both the .enl and the .data files. The .data folder contains attached files, terms lists and group information.

### 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 EndNote.

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

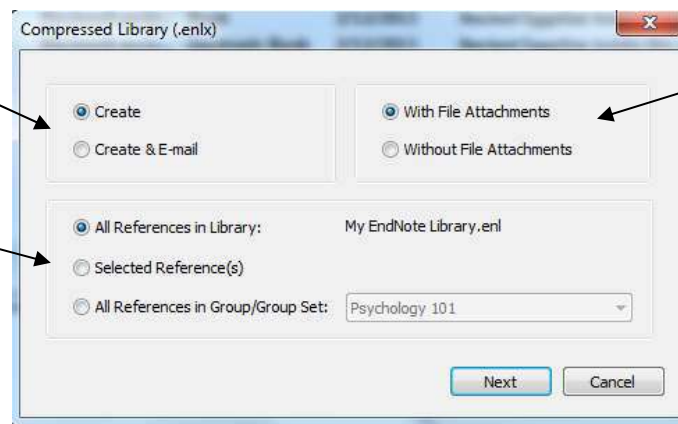
### Save a Compressed Copy

You can save your complete library (both the .enl and the .data file) to a single compressed file. The single file will be an .enlx file that you can restore (unzip) with Endnote.

1. Open the library in Endnote
2. From the File menu, select **Compressed Library (.enlx)**
3. Choose the appropriate Compressed Library options (see below) and then click **Next**.

Choose to save a compressed library or save and then email a compressed library.

Choose whether to compress the whole library, only the references you have highlighted in your library or a specific group of references.



Choose whether or not to keep the file attachments. NOTE: without file attachments libraries are much smaller in size and therefore easier to email to others.

## How to get EndNote & Help

The latest versions available at The University of Auckland are version X7 for Mac and version X7 for Windows.

### EndNote at the University

EndNote is installed on most University computers, in student computing laboratories and staff and graduate offices, and in the Library. If EndNote is not installed on a computer that you are using please contact the IT support person for your department/faculty.

### EndNote at Home

- **Students** – EndNote X7 is available to purchase on CD from the Kate Edgar Information Commons, the Grafton Information Commons, the Epsom Information Commons and the Tamaki Information Commons. The cost is \$60.00.
- **Staff** - Please contact computer support staff for you department/faculty if you wish to have EndNote installed at home.

### Installing or Upgrading EndNote

If you are upgrading your EndNote version, it is recommended that you uninstall earlier versions. Before you uninstall an earlier version, you must backup any styles, import filters and connection files that you don't want overwritten.

If you are working on a word document using your EndNote library then you must un-format the word document before upgrading your version of EndNote.

Important Note: If you are collaborating or sharing EndNote files with a colleague you should all use the same version of EndNote.

### System Requirements

Information about the system requirements and word processor compatibility for EndNote can be found on the following webpages for both Windows and Macintosh:

<http://endnote.com/en/requirements>

## Help

- The Library Web Page: <http://www.library.auckland.ac.nz/endnote/endnote.htm>
- The official EndNote Web Page: <http://www.endnote.com>
- EndNote contains a useful quick guide, which is available whenever you use your computer. You can find it via **Start >> All Programs >> EndNote >> Getting Started Guide**, or locate the .pdf file in the EndNote folder on your C:\ drive. You will need Adobe Acrobat Reader to view the manual and it can be downloaded free from: <http://www.adobe.com/support/downloads/>
- The official and more comprehensive 800 page EndNote manual is also available on the EndNote website: <http://endnote.com/if/online-user-manual>



# PART TWO

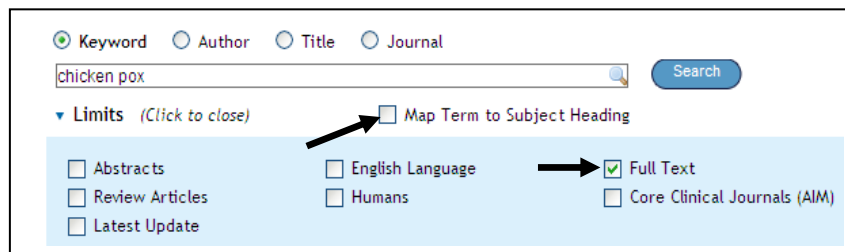
## Direct Export results from a Database

Direct export is the quickest and easiest method for getting references from a database into EndNote. Not all databases offer a direct export option. To find out if a database supports direct export you can check any of the following:

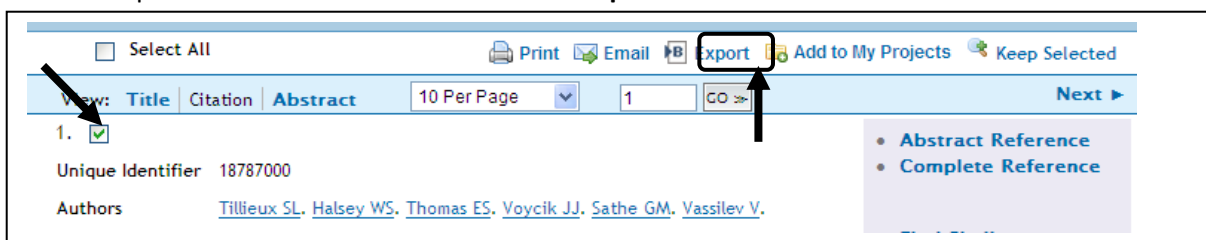
- the help within a database
- information on the database Connect Page
- information in the full EndNote manual under 'Appendix D: Direct Export Formats and Import Formats'.

### Example: Direct Export from the Medline Database:

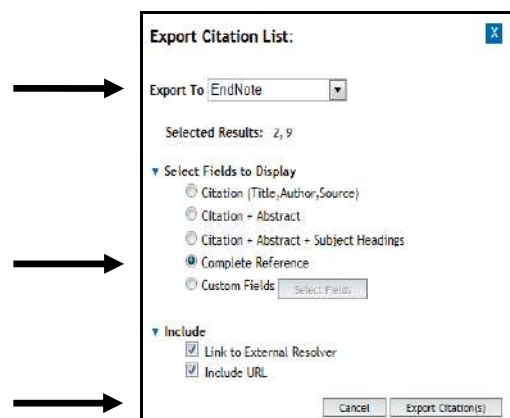
1. Open the Medline OvidSP Database.
2. Search for **chicken pox**  
Tick the **Full Text** box, and un-tick the **Map Term to Subject Heading** box.



3. Select some of the results by ticking the box next to the result number
4. Find the options above the first result and click **Export**



5. From the Export To drop-down menu choose **EndNote**
6. Select **Complete Reference**
7. Click **Export Citation(s)**



In order to demonstrate another feature of EndNote you need to save one reference from the Medline database in PDF format:

1. Return to the window displaying the Medline search results
2. Find a reference with the option **PDF Full Text** and click on the link
3. From the Adobe toolbar (not the web browser toolbar) click the **Save** icon.
4. Rename the file (the default filename is a long sequence of letters and numbers) the author's surname is a good choice for filename, and save the file to the desktop.
5. You can then Log off from Medline

## Add a File Attachment

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

1. Select the reference you want to attach the file to.
2. From the References menu select **File Attachments >> Attach File**.
3. From the dialog box locate the file you saved earlier. At the bottom of the screen you will see this option:

Copy this file to the default file attachment folder and create a relative link.

If this box is not ticked then the file will not be copied into EndNote. Only a file path to where the article is saved will be added to the reference.

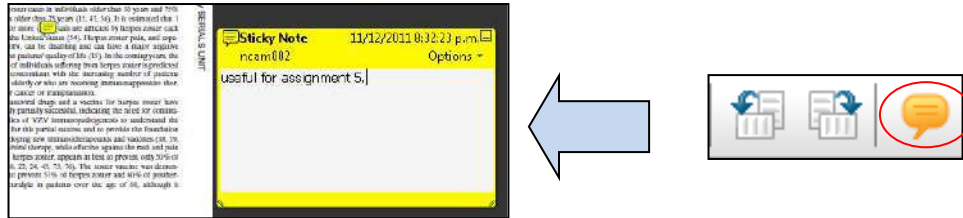
4. The file is attached to the reference in your EndNote Library and an icon will appear in the File Attachments field. Double-clicking the icon will open the appropriate program for you to read the file.
5. The original file that was saved earlier is now duplicated in your EndNote .data folder. The original file can now be deleted.

When you insert a file into an EndNote reference, EndNote saves the file in a data folder in the same location as your EndNote library. The data folder will have the same name as your library, plus the .data file extension. For example if your library was named mylibrary.enl the folder where images are stored would be named mylibrary.data. If you need to delete a file from EndNote, open the EndNote reference, scroll to the File Attachments field, select the icon and press the **Delete** key on your keyboard. Warning: If you delete the file within the Reference, it is also deleted from the .data folder. Make a copy of the file before deleting it from a reference if you want to retain a copy.

## Work with PDFs

1. **Highlight** the reference and use the preview window on the right hand side of the screen.
  - Use the **Reference Tab** to: change any reference details and add your own text to the Research Notes field.
  - Use the **Preview Tab** to: see a preview of the citation.

- Use the **Attached PDF Tab** to: view the attached PDF. You can also Email, Print or Zoom etc. by using the appropriate buttons. To annotate PDFs using the “sticky note” feature from within Adobe Acrobat – click on the sticky note icon on the options ribbon.



2. **Open** the reference from the **library window** by double clicking on it, from here you can:
  - Change any reference details and add your own text to the Research Notes field.
  - View attached PDFs by opening the PDF from the file attachments field

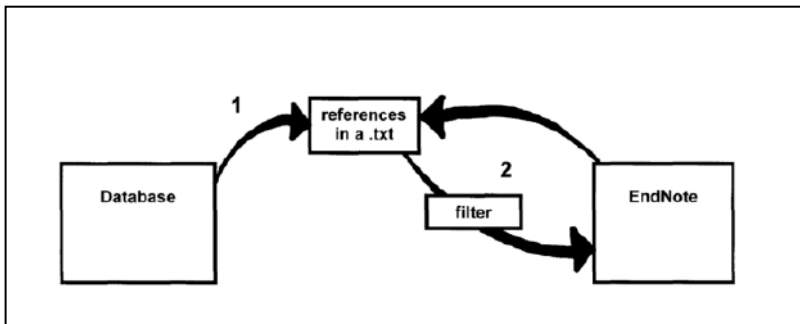
**Note:** To save any changes made to a reference or to an attached PDF you must close the reference (**Ctrl-W**). You will then be prompted to save.

## Import Records using a Filter

### What is an Import Filter?

An import filter is a file used by EndNote to import references contained in a data file. A data file contains records captured or saved from a database. A filter instructs EndNote precisely how to interpret the information in the data file, and copies the information in each field to the corresponding field in EndNote. Each filter is unique to a specific database and its provider e.g. a filter for Medline from Ovid will be different to a filter for Medline from Ebsco.

Using an import filter is a two-part process



1. Save references from the database into a file in an EndNote compatible format.

2. The file is then imported into EndNote using the appropriate import filter.

### Saving Additional Import Filters

EndNote comes with hundreds of standard import filters that correspond with most of the Library databases that don't have a direct export option. In some cases the import filter you require may not be available in EndNote, these filters can be downloaded from the Library EndNote web page (<http://www.library.auckland.ac.nz/endnote/endnote.htm>).

Save the filter file in a folder (eg: endnotex7filters) in one of the following locations :

- C:\Documents and Settings\[User Name]\My Documents\ (for Windows XP)
- C:\Users\[User Name]\ Documents\ (for Windows Vista or Windows 7 ).

You will need to make sure the EndNote folder locations match where you are saving the filters. In EndNote select **Edit > Preferences > Folder Locations** to check the locations.

### Part 1. Downloading References from INNZ : Index New Zealand

1. The **Library** website >> **Databases** >> **Browse A-Z** >> **I** >> **Index New Zealand: INNZ**
2. Click **Direct Connect**, and Search for **tuatara**
3. Find the **Full Record** Options section underneath the results
4. Make the following selections and click **Print/Save**  
(You can tick the boxes next to each citation to save individual citations if you don't want them all)

5. Use the internet browser options to save the results.
6. Save the .txt file to your desktop. You may want to rename the file to make it easily identifiable.
7. Click the back button to see the results in INNZ and then exit the database.
8. You have now saved references from the database in an EndNote compatible format and you are ready to import those references into EndNote.

## Part 2. Importing Downloaded References into EndNote

1. Open EndNote (**Start >> Programs >> EndNote >> EndNote Program**) and open the library into which you want to import your references.
  2. **File >> Import**
  3. Click **Choose File...** to locate and open the file you saved above.
  4. Double-click your file name, or highlight it and click the **Open** button, the file name is pasted into the box.
- 
5. Click the **Import Option** drop-down menu and select the database you are importing from.  
If your chosen filter has not previously been used on EndNote it will not appear on the drop-down list of filters. You can find it by choosing Other Filters from the Import Options list.
  6. In the **Choose an Import Filter** window scroll through the list of available filters and select INNZ. Once you have used an import filter EndNote retains that setting so the filter is ready for use next time and appears in the **Import Options** drop-down list.
  7. Select an option from the Duplicates list. A reference is considered a duplicate if the Author, Year, Title, and Reference Type match a reference already in the library. You can choose to:
    - a. **Import All:** Imports all references, including duplicates.
    - b. **Discard Duplicates:** Imports all references except duplicates.
    - c. **Import into Duplicates Library:** Duplicate references are imported into a library called FILE-DUPL.ENL where "FILE" is the name of the library into which you are importing. Sometimes EndNote won't detect duplicates because of minor variations or errors in citations, so you should always check your references after they have been imported.
  8. Click the **Import** button to import the file.

When the import is complete, only the newly imported references will show in the Library window. This is an intermediate stage which gives you the opportunity to modify references as required before they are aggregated into the main library. At this stage you can check individual records to ensure the data has been imported into the correct fields, or add your own research notes.

9. To view your complete library Click **All References**.

## Importing another EndNote Library

If you can't access your existing EndNote library and want to save references to EndNote you can create a new library for that day and then import it into your existing library later. You can also use this method if you want to import an EndNote library someone else has sent you into your library.

1. **File >> Import** (This will open the Import dialog box).
2. Click the **Choose File** button and find the library (.enl file) you wish to import.
3. In the **Import Option** box select **EndNote Library** from the drop-down menu

4. In the **Duplicates option** select **Discard Duplicates** or **Import into Duplicates Library**.
5. Leave the **Text Translation** option as **No Translation**.
6. Press the **Import** button to import the other library into your own.

## Importing References from PDF files

Endnote allows you to import PDF files, or folders of PDF files, directly into your Endnote Library. The import process automatically attaches the PDF to an Endnote reference and populates some of the reference fields. Please be aware that the amount of information that comes across depends on the age and source of the PDF and in some cases, particularly for older files, the import might not be successful.

1. **File>>Import** (This will open the import dialog box)
2. Click the **Choose File** (or Folder for a folder of PDFs) and navigate to your saved PDF document(s)
3. In the **Import Option** box select **PDF** from the drop-down menu
4. In the **Duplicates** option select **Discard Duplicates** or **Import into Duplicates Library**
5. Leave the **Text Translation** as **No Translation**.
6. Press the **Import** button to import the other library into your own.

## Use Groups to Manage your References

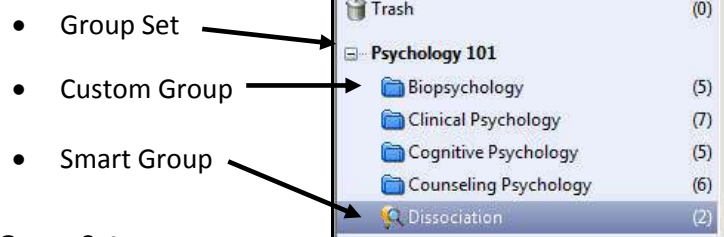
The groups you can create fall into three categories; **custom groups, smart groups and group sets**.

### Group Sets

Group Sets allow you to form a two-tier hierarchy with your groups.

#### Creating a Group Set

1. From the **Groups** menu select **Create Group Set**.
2. A box will appear in the left column. Type your group name in here, eg: Psychology 101



#### Adding Custom Groups or Smart Groups to a Group Set

1. Follow the steps above to create the Custom and/or Smart Group to be included in the Group Set.
2. Once created click and drag the name of the group you want onto the name of the set.

## Smart Groups

Smart Groups are like rules in your email program. You set up a search and any time a reference is added to the library that meets the search parameters it is automatically added to the smart group. Smart Groups can be identified by the light-bulb and magnifying glass icon next to the group.

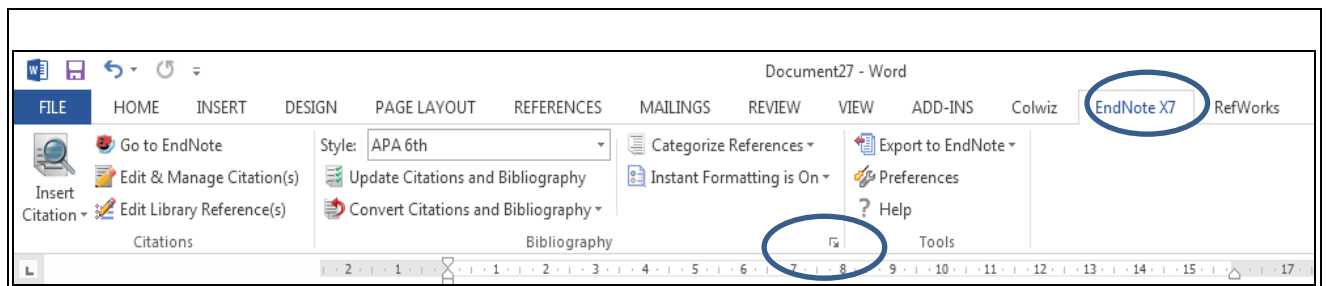
### Creating a Smart Group

1. Enter the search you want in the Search Pane
2. Click on the Options button and choose Convert to Smart Group
3. An option to name the Smart Group will appear in the left column, type your group name here.

## Format the Reference List

Change the appearance of the reference list at the end of a document, eg: font or line spacing.

1. In Word, choose the **EndNote X7** tab. Click on the arrow icon to the right of Bibliography



2. Select the **Layout** tab, and use the options in this window to change the layout

The screenshot shows the 'EndNote X7 Configure Bibliography' dialog box with the 'Layout' tab selected. The 'Format Bibliography' section is active. The 'Font' is set to 'Calibri' and the 'Size' is '11'. The 'Bibliography title' is 'Reference List'. The 'Start with bibliography number' is '1'. The 'First line indent' is '0.000 cm', 'Hanging indent' is '1.270 cm', 'Line spacing' is 'Single', and 'Space after' is 'None'. There are 'OK', 'Cancel', and 'Help' buttons at the bottom.

Choose the font and size you want your reference list to be displayed in.

Choose whether or not you want a heading at the beginning of your reference list.

Adjust the indents within a reference or the spacing between references.

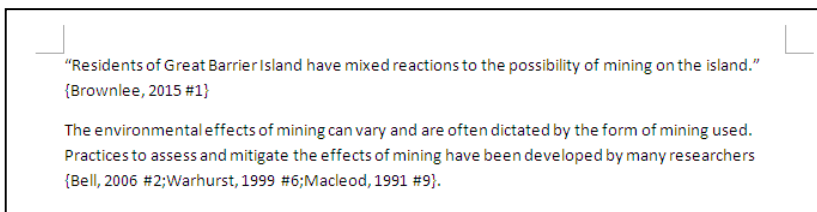
## Unformat and Reformat a Document

There are a number of reasons why you may need to unformat and reformat the EndNote citations in your document.

- If you need to work on multiple computers and they have different versions of Word, it is safest to save and open your document in an unformatted state.
- If you are working on a long document and need to change the referencing style it is best to unformat to remove the formatting from the old style before formatting in a new style.
- If you need to copy large sections of your document to another document – especially when compiling a thesis from separate chapters into one file – it is best to do this in an unformatted state.
- Some people prefer to work on an unformatted version of their document as it is often faster and they do not want to see their reference list as they work.

### Unformatting

- 1 From the ribbon in Microsoft Word, choose the **EndNote X7** tab
- 2 Select **Convert Citations and Bibliography**
- 3 Four options will appear, select **Convert to Unformatted Citations**



This is how your document will appear if you have instant formatting turned off or wish to work with an unformatted document.

### Reformatting

- 1 From the ribbon in Microsoft Word, choose the **EndNote X7** tab
- 2 Make sure the style you want the document formatted in is showing in the Style window
- 3 Select **Update Citations and Bibliography**

It is possible to use this command on both formatted and unformatted documents. If your document is already formatted it will simply update it for you. If your document is unformatted then all citations will be formatted and a reference list created.



This is the reformatted document using Numbered style.

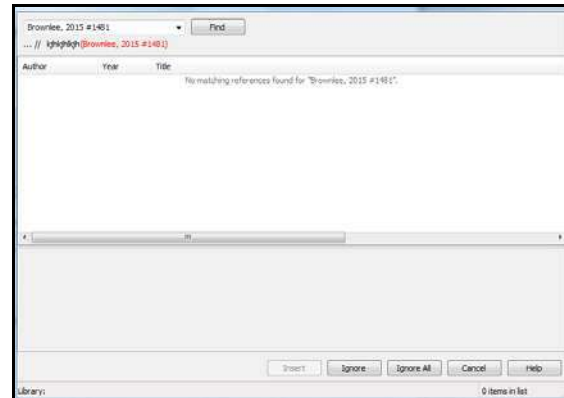


## Mismatched Citations

When EndNote formats your document it may have difficulties matching the unformatted citation in your document with a specific citation in your library. If this occurs a dialog box will appear.

Each 'problem' citation will be identified in turn, and you will have the following options:

- EndNote will provide suggestions for possible replacements. If one of these is suitable, select the citation in this window and press the **Insert** button - the mismatched citation will be replaced.
- If none of EndNote's suggestions is appropriate you can search your EndNote library from the dialog box that appears and find an alternative yourself. When you have found the relevant citation, select it and press the **Insert** button to replace the mismatched citation.
- If you do not wish to fix the problem at this stage, choose the **Ignore** button. This means that the citation you chose to ignore will not be formatted, however you can of course come back to it later.



Generally, if EndNote cannot find a citation it is either because you have accidentally deleted it from your library, or have made an alteration to it that has resulted in EndNote being unable to identify it. If the former is the case you will need to re-enter the citation. When you reformat your bibliography, EndNote still will not identify it but you will be able to locate it in your library and re-insert the citation.

**Note** that if you have used the indicators {and } for text other than EndNote citations, EndNote might bring up these instances – choose to ignore them.

## Unformatting and Reformatting when Compiling a Thesis

One of the most common reasons for using the unformatting and reformatting options is to combine multiple chapters into a single thesis document. Follow the steps below to ensure this is done smoothly.

1. Unformat the separate chapters and temporarily remove any reference lists.
  - Follow the instructions above to unformat a chapter.
  - Save your chapter under a different name, eg: chapter1unformatted.doc.
  - Repeat this process for all chapters.
2. Insert your chapters into a single document.
  - Open a document and create any preliminary pages (eg: title page, abstract). Position your cursor after the preliminary pages.
  - From the Insert tab, in the Text group, click **Object >> Text from File...**
  - Select the file you want to insert, eg: chapter1unformatted.doc, and click **Insert**
  - Move your cursor to the start of the next section and follow the steps above to insert the other chapters.
3. Reformat your document and recreate a reference list.

- Follow the instructions above to format the complete document and your reference list will be added to the end of the document.
- If you do not want your reference list at the end of your document, cut and paste it to the appropriate location.

For further information, book and attend a Student Learning Centre Course on compiling a thesis.

## Removing Field Codes (convert to Plain Text)

When you insert citations into Word, they have 'hidden codes' attached to them. These codes allow EndNote to format, un-format, and re-format citations. If you are going to submit your work to a publisher or any other situation where you are sending the document without attaching your library you must remove the field codes first.

From the EndNote tab select **Convert Citations and Bibliography**. Three options will appear select Convert to **Plain Text**. This process will create a plain text copy of your document which you should then save under a new name. Note that this copy cannot be re-formatted by EndNote. Any changes should be made on your original.

## Create Bibliographies: general, subject and annotated

EndNote creates what is known as a 'reference list' at the end of your document i.e. a list of all works actually cited. Some disciplines require a bibliography as opposed to (or as well as) a reference list i.e. a list of all works consulted or read. There are functions within EndNote that you can use to create different types of bibliographies.

EndNote X7 can create a **general bibliography** (i.e. a listing of a selection of references), a **subject bibliography** (i.e. listings under particular headings) or an **annotated bibliography** (i.e. a listing of references, each including an abstract).

### General Bibliography

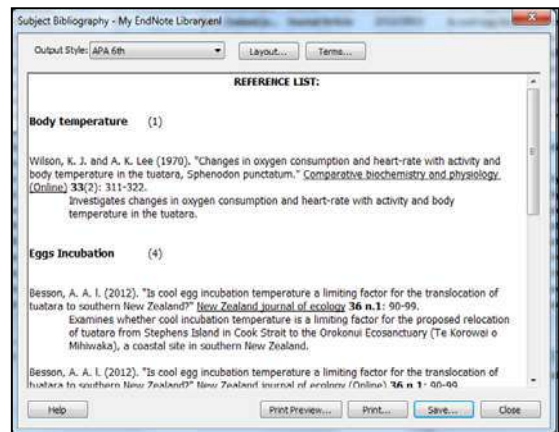
There are many ways to create a general bibliography. One of the simplest is to use the Copy Formatted command.

1. In EndNote, select the references you want to include in the bibliography
2. Check that the appropriate style is displaying in the EndNote toolbar
3. **Edit >> Copy Formatted (or Ctrl+K)**
4. In MS Word, use the paste option (or **Ctrl + v**) to add the references to a document.

## Subject Bibliography

Subject bibliographies consist of various listings under particular headings (such as keywords, authors, or publishers).

1. Choose the records in EndNote you want for a separate bibliography, perhaps a selected group instead of the whole library. Highlight your selected references and then click **References >> Show Selected References**.
2. Select an appropriate style from the Style Manager .
3. **Tools >> Subject Bibliography**.
4. The **Subject Fields** window displays a list of all the different fields that a reference can have.
5. Select the field (or fields) that you want to sort your bibliography by, eg: keywords.
6. Once you have chosen your field click **OK**. A list will be displayed of the various terms found within this field and the number of references in your EndNote Library containing each term.
7. Select the terms to be included in the bibliography by holding down the **Ctrl** key as you click the terms you want, or click **Select All** to include them all.
8. Then click **OK** and your subject bibliography is created in a new window. Use the Layout button at the top of the screen to change some features before saving or printing the bibliography.



## Annotated Bibliography

### Using the Annotated Style

The simplest way to create an annotated bibliography using EndNote is to use the **Annotated Style**. This will display your results with the information from the Abstract Field under each reference.

Cohen, E. (2006). "Hard core." *Interior Design* 77, pt. 3: 39-41.

An article on the interior design of San Francisco-based [Sculpturesite](#) Gallery, undertaken by local design-build architecture firm Sand Studios. Utilising materials such as hot-rolled steel, poured concrete and cast glass, they have created the ideal backdrop for the dancing sculptures on display in the gallery.

Donson, G. (2006). "Natural Light - Glass from the Pacific." *Craft Arts International*(66): 104-105.

Review of the exhibition 'Natural Light - Glass from the Pacific' held at Koru Contemporary Art, Auckland, New Zealand (9 September - 15 November 2005). The exhibition features cast glass pieces by glass artists Emma Camden and David Murray who live and work in Wanganui on the West coast of New Zealand.